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ABSTRACT

This publication contains competency task lists that address principal entry-level and career-sustaining jobs in the occupational categories of general merchandise retailing, food service management, and business and personal services marketing. Section I, Development of the Competency Task Lists, provides details on how the competencies were developed and validated and what tools were used in doing so. Section II, Uses for the Competency Tasks Lists in the Marketing Education Classroom, includes general notes on using the information found in the next three sections. Sections III, IV, and V contain competency tasks lists for each training position within each of the three occupational categories, student competency checklists for each training position, a list of tools and equipment used on the job, and a list of the ways basic academic skills are used on the job. Section III on general merchandise retailing contains competency task lists and student competency checklists for cashier, stocker, salesperson, and department manager/supervisor. Section IV on food service management contains competency task lists and student competency checklists for restaurant waitperson, restaurant manager/supervisor, quick-serve restaurant crew leader, and quick-serve restaurant supervisor/manager-trainee. Section V on business and personal marketing contains competency task list and student competency checklist for customer service representative. Appendixes include request for validators, surveys, and correspondence. (YLB)

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VALIDATED COMPETENCY TASK LISTS

FOR

GENERAL MERCHANDISE RETAILING, FOOD SERVICE MANAGEMENT, AND BUSINESS AND PERSONAL SERVICES MARKETING

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VALIDATED COMPETENCY TASK LISTS

for

General Merchandise Retailing,

Food Service Management, and

Business and Personal Services Marketing

By

Suzanne G. Faught

Published by

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EIMC/Educational Resources
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Foreword

In 1993-94, the Texas Education Agency contracted with EIMC/Educational Resources at The University of Texas at Austin to develop competency task lists that address principal entry-level and career-sustaining jobs in the occupational categories of general merchandise retailing, food service management, and business and personal services marketing. These task lists were to include or provide for (1) validation by a variety of related business persons and marketing educators; (2) organization that facilitates the development of training plans, competency profiles, and individualized instructional materials; and (3) organization that facilitates periodic updating and revalidation of this list. The publication, *Validated Competency Task Lists for General Merchandise Retailing, Food Service Management, and Business and Personal Services Marketing*, is the result of this project.

Section I of this publication, Development of the Competency Task Lists, provides details on how the competencies were developed and validated and what tools were used in doing so. This information should be useful for marketing educators who want to develop additional competency task lists for other areas of marketing.

Section II, Uses for the Competency Task Lists in the Marketing Education Classroom, includes (1) general notes on using the information in the section; (2) competency task lists for developing training plans and instructional materials for the training positions within the three occupational categories; (3) student competency checklists for tracking individual student progress; (4) a list of the main tools and equipment used on the job; and (5) a list of some of the ways basic academic skills are used on the job.

Acknowledgments

EIMC/Educational Resources wishes to acknowledge with grateful appreciation the following Texas marketing educators and business persons who helped make this research project and the resulting publication possible.

1993–94 Marketing Education Curriculum Advisory Task Force

- Bill Bilbruck, marketing education teacher, Plainview High School, Plainview
- Jerry Gates, marketing education teacher, Uvalde High School, Uvalde
- Betty Helton, marketing education teacher, McCallum High School, Austin
- Adell Morton, marketing education teacher, Allen High School, Allen
- Sheryl Nelson, marketing education teacher, Tuloso-Midway High School, Corpus Christi
- Dr. Marcella Norwood, vocational teacher educator, University of Houston, Houston
- Juan Rocha, marketing education teacher, Lake View High School, San Angelo
- Larry Russell, marketing education teacher, Clear Lake High School, Houston
- Nelda Shipp, marketing education teacher, Mineola High School, Mineola
- Berry Sullivan, vocational teacher educator, Southwest Texas State University, San Marcos
- Sandra Telles, marketing education teacher, Coronado High School, El Paso
- Mildred Vannoy, marketing education teacher, Livingston High School, Livingston
- Michelle Walker, doctoral candidate in vocational education, University of North Texas, Denton

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- Betty Helton, marketing education teacher, McCallum High School, Austin
- Adell Morton, marketing education teacher, Allen High School, Allen
- Sheryl Nelson, marketing education teacher, Tuloso-Midway High School, Corpus Christi
- Dr. Marcella Norwood, vocational teacher educator, University of Houston, Houston
- Juan Rocha, marketing education teacher, Lake View High School, San Angelo
- Larry Russell, marketing education teacher, Clear Lake High School, Houston
- Berry Sullivan, vocational teacher educator, Southwest Texas State University, San Marcos
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Staff Members

- Emmett Eary, Program Director for Marketing Education, Texas Education Agency, Austin
- Suzanne Faught, curriculum specialist for marketing education, EIMC/Educational Resources, The University of Texas at Austin

Other Educators and Business People

EIMC/Educational Resources also recognizes with sincere appreciation the marketing educators who responded to the various survey forms. Significant assistance in developing mailing lists for

the surveys was provided by business and industry representatives including Mr. Maurice Aresty, President of the Retail Merchants Association of Houston, and Mrs. Edith Patterson, Executive Director of the Texas Marketing Education Foundation.

Other Resources

Valuable resources in preparing to undertake this project were found in the 1991 EIMC/ Educational Resources publication, *Validated Competency Task Lists for Apparel and Accessories Marketing*, by Dr. Barbara Selke-Kern, former director of Educational Resources, and the 1993 publication, *Validated Competency Task Lists for Food Marketing*, by Suzanne G. Faught.

Another especially helpful publication was the 1992 *Food Service Management: A Secondary/ Postsecondary Program to Prepare Food Service Specialists*, a 2+2 project of three Virginia secondary school systems and a community college, produced by the Virginia Vocational Curriculum and Resource Center. Also useful was the *Education for Employment Task Analyses and Task Lists—Food Services*, developed by the Illinois State Board of Education, Adult, Vocational, and Technical Education and available through the Curriculum Publications Clearinghouse at Western Illinois University.

Texas Education Agency

EIMC/Educational Resources also acknowledges with grateful appreciation the continual guidance and support provided by Emmett Eary, Program Director for Marketing Education, at the Texas Education Agency. This publication, as well as others within marketing education curriculum development, is the result of Mr. Eary's concern for industry-validated research, which can be used to develop up-to-date curriculum and instructional materials for Texas students and teachers.

Section I

Development of the Competency Task Lists

Development of the Competency Task Lists

Introduction and Overview

This section describes how the lists of competencies and related information for the various training positions were developed and validated. Although the positions are different, a similar procedure was used in developing each one. It also provides examples of the tools that were used in accomplishing these tasks so that additional competency task lists for other areas of marketing might be developed and validated by marketing educators.

Developing the Competency Task Lists

Marketing Education Curriculum Advisory Task Force

The Marketing Education Curriculum Advisory Task Force (MECATF) is composed of the marketing education teachers who serve as curriculum committee chairs of the ten Texas marketing education districts, as well as the teacher-educators from the universities with marketing education teacher training programs. The committee met to discuss the development of competency task lists for entry-level and mid-management jobs within the three occupational categories in August, 1993. The committee recommended possible resources for background information and for securing related business persons to serve as validators.

The curriculum specialist explained how the final product would be used as the primary resource in revising the software developed to create training plans keyed to instructional resources such as the state-adopted texts, occupationally specific student manuals, and MarkED's LAPs. Additionally, the committee was shown the application of the information to update the student competency profiles using the student competency checklists developed through this project.

Marketing Education Project Advisory Committee

The Marketing Education Project Advisory Committe, a subcommittee of MECATF, is composed of five marketing education teachers, the teacher-educators, and staff members from the marketing education program at the Texas Education Agency and from EIMC/Educational Resources at The University of Texas at Austin. At their fall meeting on October 16, 1993, the committee reviewed the survey forms for general merchandise retailing and food service management already developed by the curriculum specialist. They also determined the training positions to be validated for business and personal services marketing. The committee recommended appropriate individuals, trade organizations, and businesses to help validate the task lists.

Industry-Specific Resources

In response to a letter explaining the project to several business people serving on the Texas Marketing Education Foundation and others, the curriculum specialist received a wealth of background information used in developing the survey instruments. These persons offered job descriptions, task lists, and training materials from their respective companies, as well as the willingness to assist with the actual validation process.

Texas Education Agency

The Program Director for Marketing Education at the Texas Education Agency reviewed each of the survey forms developed by the curriculum specialist. His recommendations were incorporated into the final survey instruments prior to their distribution to the marketing educators and appropriate business people.

Validating the Competency Task Lists

Survey Forms

The competency task lists that resulted from the compilation of background information were analyzed, refined, and organized into survey forms for validation. The information requested from the respondents included (a) background information about the respondent; (b) the respondent's opinion regarding the importance of each task; and (c) the respondent's opinion regarding whether or not the task would be expected of a beginning (entry-level) employee. Space was allocated for additional tasks the respondents felt were important, as well as for general comments.

Educators

Each survey form was distributed to approximately forty-five marketing educators, including (a) the teachers serving as District Directors for marketing education in Texas; (b) the teachers serving as chairpersons of the three leadership committees (including the Marketing Education Curriculum Advisory Task Force) within each district; (c) a number of marketing education teachers with students currently training in the related occupational category; (d) the teacher-educators for marketing education; and (e) the Program Director for Marketing Education at the Texas Education Agency. An additional two surveys were included so that the marketing education teacher could solicit the input of two local business people in the identified occupational area. To encourage a high response rate for the surveys, business-reply envelopes were provided.

Industry-Specific Business People

The survey forms for each occupational category were also distributed to approximately 100 related business people recommended by marketing education teachers and members of the Texas Marketing Education Foundation. Due to the area of expertise, the respondent may have received one or more surveys. To encourage a high response rate, business-reply envelopes were provided, and respondents could request that a complimentary copy of the final competency task lists be sent when published.

Refinements and Modifications

The comments and suggestions of marketing educators and business people who responded to the surveys were analyzed as the results were compiled. The resulting student competency checklists were refined and modified according to these recommendations. Applications in the marketing education classroom for the competency task lists and student competency checklists have been included in Section II.

Tools Used in Developing and Validating the Competency Task Lists

As the competency task lists were developed and validated, various tools were used to generate the final product, including:

(1) a request for validators for the competency task lists;
(2) the survey forms used to validate the areas of responsibility and tasks; and
(3) letters that accompanied the survey forms.

These tools are found in the Appendix and can easily be adapted for use in developing competency task lists for other areas of marketing.

Section II

Uses for the Competency Task Lists in the Marketing Education Classroom

Uses for the Competency Task Lists in the Marketing Education Classroom

Introduction

This section includes general notes on using the information found in this section, competency task lists for each training position within each of the three occupational categories, student competency checklists for each training position, a list of tools and equipment used on the job, and a list of the ways basic academic skills are used on the job.

Because the responsibilities and duties of employees can vary significantly from company to company, the survey results should be viewed as representative of the industry. Variations can occur depending on the size of the company, how it is organized, and the leadership style of the store manager.

Overview

The survey results documented on the *competency task lists* which follow are useful to secondary marketing educators in developing industry-validated training plans and selecting instructional materials that help students correlate what they learn in the classroom to what they experience on the job. Although this project involved three different marketing industries, many of the tasks found on the following lists may be appropriate in other training areas within marketing education as well. Due to the format of the competency task lists, they are *particularly useful for developing training plans and selecting instructional materials*.

As a result of the surveys, a number of *student competency checklists* were developed for secondary marketing educators to *use in documenting individual student progress, both in the classroom and on the job*. The checklist provides a method for the student, the employer, and the marketing educator to show that appropriate training and instruction have been provided and to demonstrate the degree to which the goals of that training and instruction have been achieved by the individual marketing education student.

Following the sets of competency task lists and student competency checklists, a chart listing the tools and equipment most often used by the various employees is included. A list of the ways in which employees use basic academic skills to perform their responsibilities and tasks is provided to verify the importance business people place on academics. The marketing educator should actively endorse and effect further integration of academic instruction throughout the marketing education curriculum.

Important Note

Since cashier, salesperson, stocker, and similar job titles are considered entry-level positions leading to mid-management trainee opportunities, the competencies for several manager/supervisor positions were developed and industry-validated. While only a few senior-level marketing education students may actually be receiving training as manager/supervisors, the competency list provides insight into the kinds of skills necessary to succeed in that training position.

Section III

General Merchandise Retailing

Competency Task List for Cashier in General Merchandise Retailing

Purpose

The format used in the following Competency Task List for Cashier in General Merchandise Retailing is *particularly useful in developing training plans and selecting instructional materials*. It lists the six major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
A. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.		
1. Keep checkstand area clean and well organized.	2.80	100%
2. Keep checkstand merchandise stocked and well organized.	2.80	100%
3. Replace receipt tape quickly and effectively.	3.00	75%
4. Establish and maintain familiarity with merchandise and its location.	3.00	100%
5. Be helpful, friendly, courteous, and professional.	3.00	100%
6. Establish and maintain good customer relations.	2.80	100%
7. Be sensitive to needs of customer's companions.	2.75	100%
B. PROCESS SALES TRANSACTIONS.		
1. Know all necessary product codes and department codes.	2.40	100%
2. Scan/key-enter items.	2.80	100%
3. Correct mistakes when made.	2.80	100%
4. Redeem promotional coupons.	2.60	100%
5. Follow company procedures for returns, voids, and charges.	3.00	100%
6. Collect payment from customers and make change as required.	3.00	100%
7. Package merchandise for customers.	2.60	100%
8. Give customers receipts and merchandise.	2.80	100%
9. Thank customers for business.	3.00	100%
C. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Use proper techniques for lifting, reaching, etc.	2.60	100%
2. Use tools and equipment properly and safely.	2.80	100%
3. Know and follow employer's safety policies.	2.80	100%
4. Know and follow proper emergency procedures.	3.00	100%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
5. Stay alert to and report suspicious activities.	3.00	100%
6. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.	3.00	100%
7. Follow proper procedures when selling regulated merchandise (spray paint, glue, tobacco products, etc.).	2.80	100%
D. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.		
1. Greet every customer with a smile.	3.00	100%
2. Check the customer's order as pleasantly, accurately, and effectively as possible.	3.00	100%
3. Help customers locate items.	3.00	100%
4. Thank every customer when he/she leaves.	3.00	100%
5. Help other cashiers to provide quicker customer service.	2.80	75%
E. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.		
1. Know and follow company's policies and procedures.	3.00	100%
2. Participate in meetings, training sessions, and other continuing education activities.	2.80	100%
3. Establish and maintain positive working relationships.	3.00	100%
4. Assist in other areas of the store as needed (receiving, display, stocking, inventory).	2.40	50%
5. Develop and maintain good oral and written communication skills.	2.80	100%
6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	2.60	100%
F. OTHER SKILLS AND KNOWLEDGE		
1. Reading	3.00	100%
2. Communication:		
a. written	2.80	100%
b. oral	2.80	100%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	3.00	100%
b. percentages	2.80	100%
c. decimals	2.60	75%
d. weights and measures	2.40	75%
4. Computer literacy	2.40	75%

Student Competency Checklist
Cashier in General Merchandise Retailing

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.

___1. Keep checkstand area clean/well organized.
___2. Keep checkstand merchandise stocked and well organized.
___3. Replace receipt tape quickly and effectively.
___4. Establish and maintain familiarity with merchandise and its location.
___5. Be helpful, friendly, courteous, and professional.
___6. Establish/maintain good customer relations.
___7. Be sensitive to needs of customer's companions.

B. PROCESS SALES TRANSACTIONS.

___1. Know all necessary product codes and department codes.
___2. Scan/key-enter items.
___3. Correct mistakes when made.
___4. Redeem promotional coupons.
___5. Follow company procedures for returns, voids, and charges.
___6. Collect payment from customers and make change as required.
___7. Package merchandise for customers.
___8. Give customers receipts and merchandise.
___9. Thank customers for business.

C. MAINTAIN SAFE, SECURE ENVIRONMENT.

___1. Use proper techniques for lifting, reaching.
___2. Use tools/equipment properly and safely.
___3. Know and follow employer's safety policies.
___4. Know/follow proper emergency procedures.
___5. Stay alert to and report suspicious activities.
___6. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.
___7. Follow proper procedures when selling regulated merchandise (spray paint, glue, tobacco products, etc.).

D. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.

___1. Greet every customer with a smile.
___2. Check the customer's order as pleasantly, accurately, and effectively as possible.
___3. Help customers locate items.
___4. Thank every customer when he/she leaves.
___5. Help other cashiers to provide quicker customer service.

E. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.

___1. Know and follow company's policies and procedures.
___2. Participate in meetings, training sessions, and other continuing education activities.
___3. Establish and maintain positive working relationships.
___4. Assist in other areas of the store as needed (receiving, display, stocking, inventory).
___5. Develop and maintain good oral and written communication skills.
___6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.

F. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Stocker in General Merchandise Retailing

Purpose

The format used in the following Competency Task List for Stocker in General Merchandise Retailing is *particularly useful in developing training plans and selecting instructional materials*. It lists the ten major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
A. RECEIVE MERCHANDISE.		
1. Unload the truck.	2.60	100%
2. Check carton and goods for damage.	2.40	100%
3. Move goods to appropriate area.	3.00	100%
4. Cut cartons open and test-scan as required.	1.80	50%
5. Check goods against packing slip/invoice.	2.20	50%
6. Prepare/distribute paperwork as required.	1.60	75%
B. HANDLE DISCREPANCIES WITH MERCHANDISE RECEIVED.		
1. Record problem on proper form.	2.60	50%
2. Obtain decision on how to handle problem.	2.40	75%
3. Carry out decision.	2.40	75%
4. Prepare/distribute appropriate paperwork as required.	2.40	75%
C. PREPARE SALES AREA.		
1. Clean sales floor.	2.25	67%
2. Do minor maintenance and repair.	2.00	33%
3. Remove any out-of-place items.	2.50	100%
4. Perform visual check of shelves to identify items to replenish.	2.00	67%
D. STOCK SALES AREA		
1. After rotating existing items, stock shelves with new, transferred, or back-stock merchandise.	2.25	100%
2. Hang advertising signs and shelf tags.	1.75	33%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
3. Reallocate shelf space.	2.00	33%
4. Create displays as appropriate.	1.50	0%
E. MAINTAIN STOCKROOM.		
1. Keep area and merchandise clean and organized.	2.60	75%
2. Place new stock in appropriate location.	2.60	75%
3. Rotate merchandise.	2.20	50%
4. Keep area and merchandise ready for inventory.	1.60	75%
F. ASSIST WITH PHYSICAL INVENTORY.		
1. Ensure that merchandise is located and organized properly.	2.00	25%
2. Count merchandise and record findings as appropriate.	2.40	50%
3. Distribute paperwork as required.	2.00	25%
G. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Use proper techniques for lifting, reaching, etc.	3.00	100%
2. Use tools and equipment properly and safely.	3.00	100%
3. Keep areas clean and walkways clear.	3.00	100%
4. Know and follow employer's safety policies.	3.00	100%
5. Know and follow proper emergency procedures.	3.00	100%
6. Know and follow sanitation standards.	3.00	100%
7. Stay alert to and report suspicious activities.	3.00	100%
H. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.		
1. Help customers locate items.	1.80	0%
2. Answer customer questions about products.	1.60	0%
3. Respond to customers' requests or refer them to the appropriate person.	2.00	75%
I. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.		
1. Know and follow company policies and procedures.	3.00	100%
2. Participate in meetings, training sessions, and other continuing education activities.	1.60	75%
3. Establish and maintain positive working relationships.	3.00	100%
4. Develop and maintain good oral and written communication skills.	1.60	100%
5. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	1.80	100%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
J. OTHER SKILLS AND KNOWLEDGE		
1. Reading	3.00	100%
2. Communication:		
a. written	2.00	75%
b. oral	2.00	75%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.40	75%
b. percentages	1.80	75%
c. decimals	1.60	25%
d. weights and measures	2.00	25%
4. Computer literacy	2.00	50%

Student Competency Checklist
Stocker in General Merchandise Retailing

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. RECEIVE MERCHANDISE.

___1. Unload the truck.
___2. Check carton and goods for damage.
___3. Move goods to appropriate area.
___4. Cut cartons open and test-scan as required.
___5. Check goods against packing slip/invoice.
___6. Prepare/distribute paperwork as required.

B. HANDLE DISCREPANCIES WITH MERCHANDISE RECEIVED.

___1. Record problem on proper form.
___2. Obtain decision on how to handle problem.
___3 Carry out decision.
___4. Prepare/distribute appropriate paperwork as required.

C. PREPARE SALES AREA.

___1. Clean sales floor.
___2. Do minor maintenance and repair.
___3. Remove any out-of-place items.
___4. Perform visual check of shelves to identify items to replenish.

D. STOCK SALES AREA

___1. After rotating existing items, stock shelves with new, transferred, or back-stock merchandise.
___2. Hang advertising signs and shelf tags.
___3. Reallocate shelf space.
___4. Create displays as appropriate.

E. MAINTAIN STOCKROOM.

___1. Keep area/merchandise clean and organized.
___2. Place new stock in appropriate location.
___3. Rotate merchandise.
___4. Keep area/merchandise ready for inventory.

F. ASSIST WITH PHYSICAL INVENTORY.

___1. Ensure that merchandise is located and organized properly.
___2. Count merchandise and record findings as appropriate.
___3. Distribute paperwork as required.

G. MAINTAIN SAFE/SECURE ENVIRONMENT.

___1. Use proper techniques for lifting, reaching.
___2. Use tools/equipment properly and safely.
___3. Keep areas clean and walkways clear.
___4. Know and follow employer's safety policies.
___5. Know/follow proper emergency procedures.
___6. Know and follow sanitation standards.
___7. Stay alert to and report suspicious activities.

H. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.

___1. Help customers locate items.
___2. Answer customer questions about products.
___3. Respond to customer requests or refer them to the appropriate person.

I. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.

___1. Know/follow company policies/procedures.
___2. Participate in meetings, training sessions, and other continuing education activities.
___3. Establish and maintain positive working relationships.
___4. Develop and maintain good oral and written communication skills.
___5. Develop and maintain personal characteristics and attitudes that enhance value as an employee.

J. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Salesperson in General Merchandise Retailing

Purpose

The format used in the following Competency Task List for Salesperson in General Merchandise Retailing is *particularly useful in developing training plans and selecting instructional materials.* It lists the eight major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
A. MAINTAIN INVENTORY/STOCK.		
1. Monitor stock for worn and damaged items.	2.38	83%
2. Price and reprice merchandise.	2.62	83%
3. Prepare stock for the sales floor.	2.46	75%
4. Monitor and suggest inventory needs.	1.92	42%
5. Assist in physical inventory.	2.46	92%
B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.		
1. Keep sales floor, merchandise, and stockroom neat, clean, well stocked, and well organized.	2.92	92%
2. Ensure that merchandise is properly displayed and tagged.	3.00	100%
3. Establish and maintain familiarity with merchandise and its location.	2.92	92%
C. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Use proper techniques for lifting, reaching, etc.	2.77	83%
2. Use tools and equipment properly and safely.	2.54	83%
3. Know and follow employer's safety policies/emergency procedures.	2.85	92%
4. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.	2.85	83%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
D. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.		
1. Greet every customer with a smile.	3.00	100%
2. Process the customer's transaction as pleasantly, accurately, and effectively as possible.	3.00	100%
3. Help customers locate items.	3.00	100%
4. Thank every customer when he/she leaves.	3.00	100%
5. Help other salespeople to provide quicker customer service.	3.00	100%
E. SELL MERCHANDISE AND RELATED SERVICES.		
1. Monitor and respond promptly to customer traffic.	2.77	83%
2. Listen to customers to determine their wants and needs.	2.85	92%
3. Create customer desire.	2.77	83%
4. Inform customers about available merchandise and its location.	2.92	100%
5. Translate product features into customer benefits.	2.85	100%
6. Close the sale.	2.92	100%
7. Suggest related services, e.g., opening credit accounts, layaways, gift wrap, delivery.	2.75	100%
F. PROCESS SALES TRANSACTION.		
1. Determine method of payment.	2.77	100%
2. Prepare sales and charge slips.	2.85	100%
3. Prepare paperwork for related services, if applicable.	2.69	100%
4. Scan/key-enter sales into register.	2.77	100%
5. Obtain approval for checks and credit cards.	2.92	100%
6. Make change as required.	2.92	100%
7. Package merchandise for customer.	2.77	100%
8. Give customers receipts and merchandise.	2.92	100%
9. Offer customer reassurance about purchase.	2.85	92%
10. Thank customers for business.	2.92	100%
G. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.		
1. Know and follow company's policies and procedures.	2.92	92%
2. Participate in meetings, training sessions, and other continuing education activities.	2.69	83%
3. Establish and maintain positive working relationships.	2.85	100%
4. Assist in other areas of the store as needed (receiving, display, stocking, inventory).	2.46	67%
5. Develop and maintain good oral and written communication skills.	2.54	83%
6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	2.85	92%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
H. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.92	100%
2. Communication:		
a. written	2.62	100%
b. oral	2.77	100%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.85	100%
b. percentages	2.54	83%
c. decimals	2.08	42%
d. weights and measures	1.85	33%
4. Computer literacy	2.38	50%

Student Competency Checklist
Salesperson in General Merchandise Retailing

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. MAINTAIN INVENTORY/STOCK.

___1. Monitor stock for worn and damaged items.
___2. Price and reprice merchandise.
___3. Prepare stock for the sales floor.
___4. Monitor and suggest inventory needs.
___5. Assist in physical inventory.

B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.

___1. Keep sales floor, merchandise, and stockroom neat, clean, well stocked, and well organized.
___2. Ensure that merchandise is properly displayed and tagged.
___3. Establish and maintain familiarity with merchandise and its location.

C. MAINTAIN SAFE AND SECURE ENVIRONMENT.

___1. Use proper techniques for lifting, reaching.
___2. Use tools/equipment properly and safely.
___3. Know and follow employer's safety policies and emergency procedures.
___4. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.

D. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.

___1. Greet every customer with a smile.
___2. Process the customer's transaction as pleasantly, accurately, and effectively as possible.
___3. Help customers locate items.
___4. Thank every customer when he/she leaves.
___5. Help other salespeople to provide quicker customer service.

E. SELL MERCHANDISE AND RELATED SERVICES.

___1. Monitor and respond promptly to customer traffic.
___2. Listen to customers to determine their wants and needs.
___3. Create customer desire.
___4. Inform customers about available merchandise and its location.
___5. Translate product features into customer benefits.
___6. Close the sale.
___7. Suggest related services, e.g., opening credit accounts, layaways, gift wrap, delivery.

F. PROCESS SALES TRANSACTION.

___1. Determine method of payment.
___2. Prepare sales and charge slips.
___3. Prepare paperwork for related services, if applicable.
___4. Scan/key-enter sales into register.
___5. Obtain approval for checks and credit cards.
___6. Make change as required.
___7. Package merchandise for customers.
___8. Give customers receipts and merchandise.
___9. Offer customers reassurance about purchase.
___10. Thank customers for business.

G. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.

___1. Know and follow company's policies and procedures.
___2. Participate in meetings, training sessions, and other continuing education activities.
___3. Establish and maintain positive working relationships.
___4. Assist in other areas of the store as needed (receiving, display, stocking,inventory).
___5. Develop and maintain good oral and written communication skills.

___6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.

H. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Department Manager/Supervisor in General Merchandise Retailing

Purpose

The format used in the following Competency Task List for Department Manager/Supervisor in General Merchandise Retailing is *particularly useful in developing training plans and selecting instructional materials*. It lists the nine major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
A. PLAN DAILY OPERATIONS FOR THE DEPARTMENT.		
1. Prepare department work schedule.	2.75	64%
2. Adjust work schedule when required.	2.83	91%
3. Assign duties to workers.	2.83	91%
4. Expedite work flow.	2.67	64%
5. Assist employees when required.	2.92	100%
B. MONITOR STOCK CONDITIONS IN BACKROOM AREA.		
1. Order merchandise and supplies.	2.50	55%
2. Receive merchandise.	2.50	55%
3. Unload trucks when required.	2.25	64%
4. Ensure that merchandise is properly stored.	2.75	100%
5. Maintain most economic quantity of on-hand inventory.	2.42	33%
6. Ensure that backroom area is neat and clean.	2.75	100%
C. MONITOR STOCK CONDITIONS ON SALES FLOOR.		
1. Ensure that items in need of replenishment are identified.	2.92	91%
2. Ensure that older merchandise is rotated to front of shelves.	2.83	100%
3. Plan and create displays as required.	2.67	64%
4. Ensure that special price signs are made and hung.	3.00	91%
5. Ensure that all merchandise is correctly priced and displayed.	3.00	91%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
D. TRAIN NEW EMPLOYEES.		
1. Provide instruction in store policies.	2.67	55%
2. Provide instruction in security, sales, and record-keeping procedures.	2.75	64%
3. Perform on-the-job training in specific job duties.	3.00	82%
4. Provide ongoing evaluation of employees.	2.92	82%
E. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.		
1. Respond promptly to customer needs.	3.00	100%
2. Resolve customer problems or refer to store manager.	3.00	91%
3. Promote good public relations.	3.00	100%
F. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Ensure that pallets are emptied, floors are mopped, and empty boxes are crushed as required.	2.83	82%
2. Use tools and equipment properly and safely.	2.75	82%
3. Know and follow safety policies.	2.92	91%
4. Know and follow emergency procedures.	3.00	100%
5. Report shoplifting and employee thefts.	3.00	100%
G. PERFORM ADDITIONAL MANAGEMENT DUTIES.		
1. Perform department opening/closing procedures.	2.58	73%
2. Use computer system as required.	2.67	82%
3. Prepare sales and inventory reports.	2.33	45%
4. Monitor labor expenses and productivity levels.	2.42	36%
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.		
1. Establish and maintain positive working relationships.	2.92	100%
2. Demonstrate pride in self, job, and employer.	3.00	100%
3. Stay abreast of company and industry trends.	2.50	55%
4. Participate in professional and personal development activities.	2.67	73%
I. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.83	100%
2. Communication:		
a. written	3.00	100%
b. oral	3.00	100%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.83	100%
b. percentages	2.92	100%
c. decimals	2.75	91%
d. weights and measures	2.58	91%
4. Computer literacy	2.83	100%

Student Competency Checklist

Department Manager/Supervisor in General Merchandise Retailing

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. PLAN DAILY OPERATIONS FOR THE DEPARTMENT.

___1. Prepare department work schedule.
___2. Adjust work schedule when required.
___3. Assign duties to workers.
___4. Expedite work flow.
___5. Assist employees when required.

B. MONITOR STOCK CONDITIONS IN BACKROOM AREA.

___1. Order merchandise and supplies.
___2. Receive merchandise.
___3. Unload trucks when required.
___4. Ensure that merchandise is properly stored.
___5. Maintain most economic quantity of on-hand inventory.
___6. Ensure that backroom area is neat and clean.

C. MONITOR STOCK CONDITION ON FLOOR.

___1. Ensure that items in need of replenishment are identified.
___2. Ensure that older merchandise is rotated to front of shelves.
___3. Plan and create displays as required.
___4. Ensure that special price signs are made and hung.
___5. Ensure that all merchandise is correctly priced and displayed.

D. TRAIN NEW EMPLOYEES.

___1. Provide instruction in store policies.
___2. Provide instruction in security, sales, and record-keeping procedures.
___3. Perform on-the-job training in specific job duties.
___4. Provide ongoing evaluation of employees.

E. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.

___1. Respond promptly to customer needs.
___2. Resolve customer problems or refer to store manager.
___3. Promote good public relations.

F. MAINTAIN SAFE AND SECURE ENVIRONMENT.

___1. Ensure that pallets are emptied, floors are mopped, and empty boxes are crushed as required.
___2. Use tools and equipment properly/safely.
___3. Know and follow safety policies.
___4. Know and follow emergency procedures.
___5. Report shoplifting and employee thefts.

G. PERFORM ADDITIONAL MANAGEMENT DUTIES.

___1. Perform department opening/closing procedures.
___2. Use computer system as required.
___3. Prepare sales and inventory reports.
___4. Monitor labor expenses/productivity levels.

H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.

___1. Establish and maintain positive working relationships.
___2. Demonstrate pride in self, job, employer.
___3. Stay abreast of company and industry trends.
___4. Participate in professional and personal development activities.

I. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Tools and Equipment for General Merchandise Retailing Employees

Introduction

The tools and equipment used by general merchandise retailing employees vary according to the occupational category of the employee, the size of the store, and the company's operating policies and procedures. However, a number of tools and equipment were consistent among the respondents and have been listed for entry-level (cashier, stocker, and salesperson) positions below and mid-management (department manager/supervisor) positions on the following page.

The following are the main tools and equipment that might be used by *entry-level* general merchandise retailing employees.

Cashier and Salesperson

Accounting/Office Forms
Bags—Paper, Plastic
Box/Case Cutter
Broom/Dust Mop
Calculator
Calendar
Cash Register/Terminal
Cleaning Supplies
Computer
Fire Extinguisher
First-Aid Kit
Checkstand Display Racks
Hand-held Ordering Machine
Intercom System
Optical Scanner
Price Label Gun
Price Lists
Promotional Coupons
Rain-Check Forms
Receipt Tape
Shopping Carts
Store Circulars
Telephone
Time Clock

Stocker

Backroom Conveyor System
Bags—Paper, Plastic
Baling Machine
Box/Case Cutter
Broom/Dust Mop
Calendar
Cleaning Supplies
Computer
Display Equipment and Supplies
Dolly
Fire Extinguisher
First-Aid Kit
Hand Tools
Hand-held Ordering Machine
Intercom System
Inventory Forms
Ladder
Manual Pallet Jack
Price Label Gun
Price Lists
Shelving Units
Telephone
Time Clock
Trash Compactor
Wet Mop

The following are the main tools and equipment that might be used by *mid-management* general merchandise retailing employees.

Accounting/Office Forms
Backroom Conveyor System
Bags—Paper, Plastic
Baling Machine
Box/Case Cutter
Broom/Dust Mop
Calculator
Calendar
Cash Register/Terminal
Cleaning Supplies
Computer and Applications
Display Equipment and Supplies
Dolly
Checkstand Display Racks
Hand Tools
Hand-held Ordering Machine
Intercom System
Inventory Forms
Ladder
Manual Pallet Jack
Optical Scanner
Price Label Gun
Promotional Coupons
Rain-Check Forms
Receipt Tape
Shelving Units
Shopping Carts
Store Circulars
Telephone
Time Clock
Trash Compactor

Academic Skills for Employees in General Merchandise Retailing

Introduction

The academic skills used by employees in general merchandise retailing vary according to the occupational category of the employee, the size of the store, and the company's operating policies and procedures. However, a number of academic skills were consistent among the respondents and have been listed for entry-level (cashier, salesperson, and stocker) positions and mid-management (department manager/supervisor) positions.

READING

Entry-Level

Abbreviations and symbols
Advertisements
Calendars
Charts
Computer menus
Employee benefits information
Employment forms
Job application forms
Labels
Memorandums and messages
Paychecks
Policies and procedures
Pricing information
Product information
Promotional materials
Telephone books
Time cards
Work schedules

Mid-Management Level

Abbreviations and symbols
Advertisements
Calendars
Charts
Computer menus and applications
Employee benefits information
Employment forms
Floorplans and blueprints
Job application forms
Labels
Memorandums and messages
Paychecks
Policies and procedures of carriers
Policies and procedures of employer
Policies and procedures of vendors
Pricing information
Product information
Promotional materials
Reports—inventory, sales, etc.
Telephone books
Time cards
Trade publications
Work schedules

WRITING

Entry-Level

Employment forms
Job application forms
Messages
Price change forms
Promotional signs/tags
Records and other forms

Mid-Management Level

Employment forms
Inventory/price change forms
Messages
Order equipment and supplies
Personnel forms—transfer, promotion, discipline, etc.
Promotional signs/tags
Work schedules

MATHEMATICS

Entry-Level

Calculator use
Change making
Charts and graphs
Inventory
Merchandise pricing
Paycheck verification
Receiving and checking merchandise
Records and forms
Time cards

Mid-Management Level

Calculator use
Change making when cashiering
Charts and graphs
Floor plans/shelf space interpretations
Inventory verification
Invoice amount verification
Merchandise pricing
Paycheck verification
Payroll, productivity, sales figures
Records and forms
Shelf space allocations
Time cards
Work schedule preparation

Section IV

Food Service Management

Competency Task List for Restaurant Waitperson

Purpose

The format used in the following Competency Task List for Restaurant Waitperson is *particularly useful in developing training plans and selecting instructional materials.* It lists the eight major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1 - 3 3 = Essential	ENTRY LEVEL - YES -
A. PERFORM CLEANING AND SANITIZING FUNCTIONS.		
1. Clean and sanitize equipment, utensils, and tableware.	3.00	93%
2. Clean and sanitize work and storage areas.	2.93	93%
3. Know and follow pest control procedures.	2.71	71%
B. PERFORM SETUP, SERVICE, AND CLEANUP FUNCTIONS.		
1. Set up room for table service or buffet dining.	2.86	86%
2. Set tables and serving lines for selected styles of service.	2.86	79%
3. Replenish food, beverages, condiments, and table linens.	2.86	79%
4. Clean up after serving a meal.	2.93	86%
5. Store leftover food properly.	2.93	86%
C. PREPARE AND SERVE BEVERAGES.		
1. Brew and/or serve coffee, tea, and soft drinks.	2.85	92%
2. Prepare and serve milk or milk product beverages, if offered.	2.77	92%
3. Prepare and serve fruit juices and/or beverages, if offered.	2.75	91%
4. Prepare and serve alcoholic beverages, if offered.	2.64	73%
D. PREPARE COLD FOODS.		
1. Prepare salads and salad dressings.	2.42	58%
2. Prepare garnishes.	2.50	58%
3. Prepare food trays, appetizers, and seafood cocktails, if offered.	2.58	58%
4. Prepare cold sandwiches.	2.42	58%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
E. DEVELOP AND IMPROVE CUSTOMER RELATIONS.		
1. Receive reservations for dining.	2.73	55%
2. Receive phone orders.	2.58	69%
3. Greet and seat guests, giving each guest a menu.	2.91	77%
4. Provide water, according to company policy.	2.58	85%
5. Interpret menu and take food orders.	2.92	85%
6. Bring the order to the kitchen.	2.75	75%
7. Serve each order.	2.77	77%
8. Continue to monitor each customer throughout the meal.	2.77	85%
9. Refill/replace beverages and suggest additional items.	2.77	92%
10. Present check to customer.	2.85	85%
11. Operate cash register/credit card machine, if necessary.	2.92	77%
12. Remove dishes from table, if necessary.	2.77	85%
F. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Know and follow company standards of personal hygiene.	3.00	100%
2. Use tools and equipment properly and safely.	3.00	92%
3. Know and follow health and safety policies.	2.92	100%
4. Know and follow emergency fire and first-aid procedures.	2.92	92%
5. Report accidents and employee thefts.	2.92	100%
G. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.		
1. Establish and maintain positive working environment.	2.92	92%
2. Demonstrate pride in self, job, and employer.	2.92	100%
3. Stay abreast of company and industry trends.	2.54	54%
4. Participate in professional and personal development activities.	2.46	69%
H. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.77	92%
2. Communication:		
a. written	2.77	92%
b. oral	2.85	85%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.69	85%
b. percentages	2.46	69%
c. decimals	2.38	62%
d. weights and measures	2.38	69%
4. Computer literacy	1.92	46%

Student Competency Checklist
Restaurant Waitperson

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. PERFORM CLEANING AND SANITIZING FUNCTIONS.

___1. Clean and sanitize equipment, utensils, and tableware.
___2. Clean and sanitize work and storage areas.
___3. Know and follow pest control procedures.

B. PERFORM SETUP, SERVICE, AND CLEANUP FUNCTIONS.

___1. Set up room for table service/buffet dining.
___2. Set tables and serving lines for selected styles of service.
___3. Replenish food, beverages, condiments, and table linens.
___4. Clean up after serving a meal.
___5. Store leftover food properly.

C. PREPARE AND SERVE BEVERAGES.

___1. Brew and/or serve coffee, tea, and soft drinks.
___2. Prepare and serve milk or milk product beverages, if offered.
___3. Prepare and serve fruit juices and/or beverages, if offered.
___4. Prepare and serve alcoholic beverages, if offered.

D. PREPARE COLD FOODS.

___1. Prepare salads and salad dressings.
___2. Prepare garnishes.
___3. Prepare food trays, appetizers, and seafood cocktails, if offered.
___4. Prepare cold sandwiches.

E. DEVELOP AND IMPROVE CUSTOMER RELATIONS.

___1. Receive reservations for dining.
___2. Receive phone orders.
___3. Greet/seat guests, giving each guest a menu.
___4. Provide water, according to company policy.
___5. Interpret menu and take food orders.
___6. Bring the order to the kitchen.
___7. Serve each order.
___8. Continue to monitor each customer throughout the meal.
___9. Refill/replace beverages and suggest additional items.
___10. Present check to customer.
___11. Operate cash register/credit card machine, if necessary.
___12. Remove dishes from table, if necessary.

F. MAINTAIN SAFE AND SECURE ENVIRONMENT.

___1. Know and follow company standards of personal hygiene.
___2. Use tools and equipment properly/safely.
___3. Know and follow health and safety policies.
___4. Know and follow emergency fire and first-aid procedures.
___5. Report accidents and employee thefts.

G. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.

___1. Establish and maintain positive working environment.
___2. Demonstrate pride in self, job, and employer.
___3. Stay abreast of company and industry trends.
___4. Participate in professional and personal development activities.

H. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Restaurant Manager/Supervisor

Purpose

The format used in the following Competency Task List for Restaurant Manager/Supervisor is *particularly useful in developing training plans and selecting instructional materials.* It lists the nine major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.		
1. Prepare work schedule.	3.00	80%
2. Adjust work schedule when required.	3.00	80%
3. Assign duties to workers.	3.00	80%
4. Expedite work flow.	3.00	87%
5. Assist employees when required.	3.00	93%
B. MONITOR STOCK CONDITIONS IN STORAGE AREA.		
1. Take inventory of food items, supplies, and tableware.	2.93	93%
2. Order food items, supplies, and tableware.	2.87	87%
3. Receive items and ensure that they are properly stored.	2.93	93%
4. Maintain most economic quantity of on-hand inventory.	2.93	80%
5. Keep storage area neat, clean, and sanitized.	2.93	80%
C. MANAGE HUMAN RESOURCES.		
1. Interview applicants and hire personnel.	2.93	80%
2. Provide instruction in company policies.	2.93	80%
3. Perform on-the-job training in specific job duties.	2.93	80%
4. Provide ongoing evaluation of employees.	3.00	80%
5. Organize and teach workshops for employees.	2.80	73%
6. Identify grounds and procedures for dismissing personnel.	2.93	80%
D. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.		
1. Greet guests, as required.	2.93	93%
2. Interpret the menu and take food orders, as required.	2.87	93%
3. Operate cash register/terminal, as required.	2.93	87%
4. Respond promptly to customer needs.	2.93	100%
5. Resolve customer problems.	2.93	80%
6. Promote good public relations.	2.93	93%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.		
1. Ensure that all employees meet standards of personal hygiene.	3.00	93%
2. Ensure that work and storage areas are clean and sanitized.	3.00	87%
3. Know and follow pest control procedures.	3.00	87%
4. Use tools and equipment properly and safely.	3.00	93%
5. Know and follow health and safety procedures.	3.00	100%
6. Know and follow emergency fire and first-aid procedures.	3.00	100%
7. Document accidents and employee thefts.	3.00	100%
F. PERFORM ADDITIONAL MANAGEMENT DUTIES.		
1. Perform opening/closing procedures.	2.93	93%
2. Use computer system as required.	2.93	87%
3. Prepare sales and inventory reports.	2.93	87%
4. Prepare bills and payroll for payment.	2.87	73%
5. Monitor labor expenses and productivity levels.	2.93	80%
6. Calculate cost and selling price for menu items and services.	2.87	73%
G. DEVELOP MARKETING STRATEGIES.		
1. Determine target market.	2.67	67%
2. Conduct market survey.	2.67	73%
3. Conduct follow-up survey to determine customer satisfaction.	2.73	80%
4. Develop presentation sheets for menu items.	2.73	73%
5. Design and/or employ specialists to design advertising and promotional displays.	2.67	67%
6. Survey the market for new products and equipment.	2.60	73%
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.		
1. Establish and maintain positive working relationships.	3.00	100%
2. Demonstrate pride in self, job, and employer.	3.00	100%
3. Stay abreast of company and industry trends.	3.00	93%
4. Participate in professional and personal development activities.	2.93	93%
5. Develop time management skills.	3.00	93%
I. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.93	93%
2. Communication:		
a. written	3.00	100%
b. oral	3.00	100%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	3.00	93%
b. percentages	3.00	93%
c. decimals	3.00	80%
d. weights and measures	3.00	93%
4. Computer literacy	2.79	80%

Student Competency Checklist
Restaurant Manager/Supervisor

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.

___1. Prepare work schedule.
___2. Adjust work schedule when required.
___3. Assign duties to workers.
___4. Expedite work flow.
___5. Assist employees when required.

B. MONITOR STOCK CONDITIONS IN STORAGE AREA.

___1. Take inventory of food items, supplies, and tableware.
___2. Order food items, supplies, and tableware.
___3. Receive items and ensure that they are properly stored.
___4. Maintain most economic quantity of on-hand inventory.
___5. Keep storage area neat, clean, and sanitized.

C. MANAGE HUMAN RESOURCES.

___1. Interview applicants and hire personnel.
___2. Provide instruction in company policies.
___3. Perform on-the-job training in specific job duties.
___4. Provide ongoing evaluation of employees.
___5. Organize and teach workshops for employees.
___6. Identify grounds and procedures for dismissing personnel.

D. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.

___1. Greet guests, as required.
___2. Interpret the menu and take food orders, as required.
___3. Operate cash register/terminal, as required.
___4. Respond promptly to customer needs.
___5. Resolve customer problems.
___6. Promote good public relations.

E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.

___1. Ensure that all employees meet standards of personal hygiene.
___2. Ensure that work and storage areas are clean and sanitized.
___3. Know and follow pest control procedures.
___4. Use tools and equipment properly and safely.
___5. Know and follow health and safety procedures.
___6. Know and follow emergency fire and first-aid procedures.
___7. Document accidents and employee thefts.

F. PERFORM ADDITIONAL MANAGEMENT DUTIES.

___1. Perform opening/closing procedures.
___2. Use computer system as required.
___3. Prepare sales and inventory reports.
___4. Prepare bills and payroll for payment.
___5. Monitor labor expenses and productivity levels.
___6. Calculate cost and selling price for menu items and services.

G. DEVELOP MARKETING STRATEGIES.

___1. Determine target market.
___2. Conduct market survey.
___3. Conduct follow-up survey to determine customer satisfaction.
___4. Develop presentation sheets for menu items.
___5. Design and/or employ specialists to design advertising and promotional displays.
___6. Survey the market for new products and equipment.

H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.

___1. Establish and maintain positive working relationships.

___2. Demonstrate pride in self, job, and employer.
___3. Stay abreast of company and industry trends.
___4. Participate in professional and personal development activities.
___5. Develop time management skills.

I. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Quick-Serve Restaurant Crew Leader

Purpose

The format used in the following Competency Task List for Quick-Serve Restaurant Crew Leader is *particularly useful in developing training plans and selecting instructional materials.* It lists the seven major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task List

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
A. PERFORM CLEANING AND SANITIZING FUNCTIONS.		
1. Clean and sanitize equipment and utensils.	2.94	94%
2. Clean and sanitize work and storage areas.	2.89	94%
3. Know and follow pest control procedures.	2.72	83%
B. PREPARE AND SERVE BEVERAGES.		
1. Brew and/or serve coffee, tea, and soft drinks.	2.56	82%
2. Prepare and serve milk or milk product beverages, if offered.	2.39	78%
3. Prepare and serve fruit juices and/or beverages, if offered.	2.35	76%
4. Prepare and serve alcoholic beverages, if offered.	2.07	50%
C. PREPARE COLD FOODS.		
1. Prepare salads and salad dressings, if offered.	2.81	75%
2. Prepare cold sandwiches, if offered.	2.56	63%
D. DEVELOP AND IMPROVE CUSTOMER RELATIONS.		
1. Receive phone orders.	2.67	72%
2. Interpret menu and take food orders.	2.94	94%
3. Fill some or all of the customer's order.	2.89	89%
4. Suggest additional items.	2.67	89%
5. Operate cash register/credit card machine, if necessary.	2.94	94%
6. Count change and issue receipt.	2.94	94%
7. Perform nonselling jobs necessary for the selling effort.	2.50	67%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGIN-NING - YES -
E. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Know and follow company standards of personal hygiene.	2.94	94%
2. Use tools and equipment properly and safely.	2.89	89%
3. Know and follow health and safety policies.	2.94	89%
4. Know and follow emergency fire and first-aid procedures.	2.83	89%
5. Report accidents and employee thefts.	2.94	94%
F. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.		
1. Establish and maintain positive working relationships.	2.89	83%
2. Demonstrate pride in self, job, and employer.	2.83	83%
3. Stay abreast of company and industry trends.	2.50	61%
4. Participate in professional and personal development activities.	2.69	63%
G. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.72	94%
2. Communication:		
a. written	2.61	94%
b. oral	2.67	94%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.83	94%
b. percentages	2.78	89%
c. decimals	2.72	83%
d. weights and measures	2.72	89%
4. Computer literacy	2.22	65%

Student Competency Checklist
Quick-Serve Restaurant Crew Leader

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. PERFORM CLEANING AND SANITIZING FUNCTIONS.

___1. Clean and sanitize equipment and utensils.
___2. Clean and sanitize work and storage areas.
___3. Know and follow pest control procedures.

B. PREPARE AND SERVE BEVERAGES.

___1. Brew and/or serve coffee, tea, and soft drinks.
___2. Prepare and serve milk or milk product beverages, if offered.
___3. Prepare and serve fruit juices and/or beverages, if offered.
___4. Prepare and serve alcoholic beverages, if offered.

C. PREPARE COLD FOODS.

___1. Prepare salads and salad dressings, if offered.
___2. Prepare cold sandwiches, if offered.

D. DEVELOP AND IMPROVE CUSTOMER RELATIONS.

___1. Receive phone orders.
___2. Interpret menu and take food orders.
___3. Fill some or all of the customer's order.
___4. Suggest additional items.
___5. Operate cash register/credit card machine, if necessary.
___6. Count change and issue receipt.
___7. Perform nonselling jobs necessary for the selling effort.

E. MAINTAIN SAFE AND SECURE ENVIRONMENT.

___1. Know and follow company standards of personal hygiene.
___2. Use tools and equipment properly/safely.
___3. Know and follow health and safety policies.
___4. Know and follow emergency fire and first-aid procedures.
___5. Report accidents and employee thefts.

F. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.

___1. Establish and maintain positive working relationships.
___2. Demonstrate pride in self, job, and employer.
___3. Stay abreast of company and industry trends.
___4. Participate in professional and personal development activities.

G. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Competency Task List for Quick-Serve Restaurant Supervisor/Manager-Trainee

Purpose

The format used in the following Competency Task List for Quick-Serve Restaurant Supervisor/Manager-Trainee is *particularly useful in developing training plans and selecting instructional materials*. It lists the nine major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.		
1. Prepare work schedule.	2.83	61%
2. Adjust work schedule when required.	2.72	67%
3. Assign duties to workers.	2.83	100%
4. Expedite work flow.	2.89	94%
5. Assist employees when required.	2.89	100%
B. MONITOR STOCK CONDITIONS IN STORAGE AREA.		
1. Take inventory of food items and supplies.	2.89	56%
2. Order food items and supplies.	2.83	50%
3. Receive items and ensure that they are properly stored.	2.72	72%
4. Maintain most economic quantity of on-hand inventory.	2.67	61%
5. Keep storage area neat, clean, and sanitized.	2.83	94%
C. MANAGE HUMAN RESOURCES.		
1. Interview applicants and hire personnel.	2.59	47%
2. Provide instruction in company policies.	2.65	82%
3. Perform on-the-job training in specific job duties.	2.76	88%
4. Provide ongoing evaluation of employees.	2.59	71%
5. Organize and teach workshops for employees.	2.35	59%
6. Identify grounds and procedures for dismissing personnel.	2.53	59%
D. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.		
1. Greet guests, as required.	2.94	100%
2. Interpret the menu and take food orders, as required.	2.82	100%
3. Operate cash register/terminal as required.	2.76	100%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	BEGINNING - YES -
4. Respond promptly to customer needs.	2.94	100%
5. Resolve customer problems.	2.94	100%
6. Promote good public relations.	2.94	100%
E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.		
1. Ensure that all employees meet company standards of personal hygiene.	2.76	100%
2. Ensure that work and storage areas are clean and sanitized.	2.94	100%
3. Know and follow pest control procedures.	2.76	76%
4. Use tools and equipment properly and safely.	2.88	94%
5. Know and follow health and safety policies.	2.88	100%
6. Know and follow emergency fire and first-aid procedures.	2.82	88%
7. Document accidents and employee thefts.	2.76	88%
F. PERFORM ADDITIONAL MANAGEMENT DUTIES.		
1. Perform opening/closing procedures.	2.82	76%
2. Use computer system as required.	2.65	59%
3. Prepare sales and inventory reports.	2.59	59%
4. Prepare bills and payroll for payment.	2.59	59%
5. Monitor labor expenses and productivity levels.	2.71	59%
G. DEVELOP MARKETING STRATEGIES.		
1. Determine target market.	2.41	47%
2. Conduct market survey.	2.35	41%
3. Conduct follow-up survey to determine customer satisfaction.	2.47	41%
4. Survey the market for new products and equipment.	2.35	47%
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.		
1. Establish and maintain positive working relationships.	2.82	88%
2. Demonstrate pride in self, job, and employer.	2.94	94%
3. Stay abreast of company and industry trends.	2.71	59%
4. Participate in professional and personal development activities.	2.82	82%
5. Develop time management skills.	2.88	82%
I. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.88	94%
2. Communication:		
a. written	2.88	94%
b. oral	2.94	100%
3. Mathematics:		
a. addition, subtraction, multiplication, and division	2.82	100%
b. percentages	2.82	100%
c. decimals	2.82	100%
d. weights and measures	2.76	100%
4. Computer literacy	2.59	76%

Student Competency Checklist
Quick-Serve Restaurant Supervisor/Manager-Trainee

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.

___1. Prepare work schedule.
___2. Adjust work schedule when required.
___3. Assign duties to workers.
___4. Expedite work flow.
___5. Assist employees when required.

B. MONITOR STOCK CONDITIONS IN STORAGE AREA.

___1. Take inventory of food items and supplies.
___2. Order food items and supplies.
___3. Receive items and ensure that they are properly stored.
___4. Maintain most economic quantity of on-hand inventory.
___5. Keep storage area neat, clean, and sanitized.

C. MANAGE HUMAN RESOURCES.

___1. Interview applicants and hire personnel.
___2. Provide instruction in company policies.
___3. Perform on-the-job training in specific job duties.
___4. Provide ongoing evaluation of employees.
___5. Organize and teach workshops for employees.
___6. Identify grounds and procedures for dismissing personnel.

D. MAINTAIN AND IMPROVE CUSTOMER-SERVICE ATTITUDE.

___1. Greet guests, as required.
___2. Interpret the menu and take food orders, as required.
___3. Operate cash register/terminal as required.
___4. Respond promptly to customer needs.
___5. Resolve customer problems.
___6. Promote good public relations.

E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.

___1. Ensure that all employees meet company standards of personal hygiene.
___2. Ensure that work and storage areas are clean and sanitized.
___3. Know and follow pest control procedures.
___4. Use tools and equipment properly and safely.
___5. Know and follow health and safety policies.
___6. Know and follow emergency fire and first-aid procedures.
___7. Document accidents and employee thefts.

F. PERFORM ADDITIONAL MANAGEMENT DUTIES.

___1. Perform opening/closing procedures.
___2. Use computer system as required.
___3. Prepare sales and inventory reports.
___4. Prepare bills and payroll for payment.
___5. Monitor labor expenses and productivity levels.

G. DEVELOP MARKETING STRATEGIES.

___1. Determine target market.
___2. Conduct market survey.
___3. Conduct follow-up survey to determine customer satisfaction.
___4. Survey the market for new products and equipment.

H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.

___1. Establish and maintain positive working relationships.
___2. Demonstrate pride in self, job, and employer.
___3. Stay abreast of company and industry trends.
___4. Participate in professional and personal development activities.
___5. Develop time management skills.

I. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication
___ a. written
___ b. oral
3. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___4. Computer literacy

Tools and Equipment for Food Service Management Employees

Introduction

The tools and equipment used by food service management employees vary according to the occupational category of the employee, the size of the business, and the company's operating policies and procedures. However, a number of tools and equipment were consistent among the respondents and have been listed for restaurant waitperson and quick-serve restaurant crew leader positions in the left column below and restaurant management positions in the right column below.

Restaurant Waitperson and Quick-Serve Restaurant Crew Leader

Accounting/Office Forms
Automatic Coin Dispenser
Broom/Dust Mop
Calculator
Calendar
Cash Register/Terminal
Cleaning Supplies
Computer
Credit Card Machine
Fire Extinguisher
First-Aid Kit
Intercom System
Menu
Promotional Coupons
Receipt Tape
Scale
Telephone
Time Clock

Restaurant Management

Accounting/Office Forms
Automatic Coin Dispenser
Box/Case Cutter
Broom/Dust Mop
Calculator
Calendar
Cash Register/Terminal
Cleaning Supplies
Computer
Credit Card Machine
Dolly
Fire Extinguisher
First-Aid Kit
Freezer Storage Units
Hand Tools
Intercom System
Inventory Forms
Ladder
Menu
Price Lists
Promotional Coupons
Receipt Tape
Scale
Telephone
Time Clock
Trash Compactor
Wet Mop

Academic Skills for Employees in Food Service Management

Introduction

The academic skills used by employees in food service management vary according to the occupational category of the employee, the size of the business, and the company's operating policies and procedures. However, a number of academic skills were consistent among the respondents and have been listed for restaurant waitperson and quick-serve crew leader positions and mid-management (restaurant manager/supervisor) positions.

READING

Waitperson and Crew Leader

Abbreviations and symbols
Advertisements and promotional coupons
Calendars
Charts
Computer menus
Employee benefits information
Employment forms
Job application forms
Labels
Memorandums and messages
Menus
Paychecks
Policies and procedures
Product information
Promotional materials
Sales checks
Telephone books
Time cards
Work schedules

Mid-Management Level

Abbreviations and symbols
Advertisements and coupons
Calendars
Charts
Computer menus and applications
Employee benefits information
Employment forms
Floorplans and blueprints
Job application forms
Labels
Menus
Memorandums and messages
Paychecks
Policies and procedures of carriers
Policies and procedures of employer
Policies and procedures of vendors
Pricing information
Product information
Promotional materials
Reports—inventory, sales, etc.
Sales checks
Telephone books
Time cards
Trade publications
Work schedules

WRITING

Waitperson and Crew Leader

Employment forms
Job application forms
Messages
Promotional signs/tags

Mid-Management Level

Employment forms
Inventory forms
Messages
Orders for equipment and supplies

Records and other forms
Sales checks

Personnel forms—transfer, promotion, discipline, etc.
Promotional signs/tags
Work schedules

MATHEMATICS

Waitperson and Crew Leader

Calculator use
Change making
Charts and graphs
Inventory
Paycheck verification
Records and forms
Scales
Time cards

Mid-Management Level

Calculator use
Change making when cashiering
Charts and graphs
Inventory verification
Invoice amount verification
Merchandise/service pricing
Paycheck verification
Payroll, productivity, sales figures
Records and forms
Scales
Time cards
Work schedule preparation

Section V

Business and Personal Services Marketing

Competency Task List for Customer Service Representative in Business and Personal Services Marketing

Purpose

The format used in the following Competency Task List for Customer Service Representative in Business and Personal Services Marketing is *particularly useful in developing training plans and selecting instructional materials*. It lists the seven major areas of responsibility for that position, with the related tasks for each area listed beneath it. The importance of each task, averaged across all respondents, is designated by the number following the task, using a scale of 1 to 3, with 1 being "not important" and 3 being "essential." The percentage of respondents who indicated that the task is expected of an entry-level (beginning) employee also follows each task.

Competency Task Lists

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
A. UNDERSTAND THE CHARACTERISTICS OF SERVICES.		
1. Recognize that services are intangible.	2.57	80%
2. Recognize that services themselves are inseparable from the service provider.	2.70	95%
3. Recognize that services are perishable.	2.43	70%
4. Recognize that standardization of services is difficult.	2.36	60%
5. Recognize that customers are often involved in the decisions made in providing the service.	2.64	85%
6. Identify target markets.	2.41	55%
B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.		
1. Keep customer service/sales area clean and well organized.	2.86	95%
2. Establish and maintain familiarity with merchandise and its location, if applicable.	2.78	71%
3. Establish and maintain familiarity with services available for purchase by the customer.	2.78	81%
4. Maintain records used in the business.	2.57	48%
5. Be helpful, friendly, courteous, and professional.	3.00	95%
C. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.		
1. Greet every customer with a smile.	2.74	95%
2. Identify the needs of customers.	2.74	71%
3. Be attentive to customers' verbal and nonverbal signals.	2.70	76%
4. Explain/demonstrate the products and/or services which best meet the needs of customers.	2.74	81%

AREAS OF RESPONSIBILITY AND TASKS	IMPORTANCE Scale 1–3 3 = Essential	ENTRY LEVEL - YES -
5. Complete the customer's order as pleasantly, accurately, and effectively as possible.	2.91	95%
6. Provide service at a level that helps ensure repeat customers.	3.00	90%
D. PROCESS SALES TRANSACTIONS.		
1. Know all necessary product, department, and service codes.	2.43	57%
2. Scan, key-enter items into cash register or write sales order.	2.61	76%
3. Correct mistakes when made.	2.91	86%
4. Redeem promotional coupons, if applicable.	2.39	76%
5. Follow company procedures for returns, voids, and charges.	2.70	86%
6. Give customers receipt.	2.65	90%
7. Thank customers for business.	2.83	86%
E. MAINTAIN SAFE AND SECURE ENVIRONMENT.		
1. Use proper techniques for lifting, reaching, etc.	2.57	90%
2. Use tools and equipment properly and safely.	2.70	95%
3. Know and follow company safety policies.	2.74	90%
4. Know and follow proper emergency procedures.	2.65	90%
5. Stay alert to and report suspicious activities.	2.65	86%
6. Follow proper procedures to protect against shoplifting, quick-change artists, and fraudulent use of checks.	2.74	81%
F. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.		
1. Know and follow company policies and procedures.	2.74	81%
2. Meet or exceed the company standards of personal hygiene.	2.78	95%
3. Communicate positive body language to customers, other employees, and management.	2.65	86%
4. Establish and maintain positive working relationships.	2.78	95%
5. Assist in other duties within the business as needed.	2.74	81%
6. Develop and improve good oral and written communication skills.	2.77	76%
G. OTHER SKILLS AND KNOWLEDGE		
1. Reading	2.68	95%
2. Communication:		
a. written	2.59	89%
b. oral	2.82	89%
c. listening	2.82	95%
3. Handwriting	2.36	89%
4. Mathematics:		
a. addition, subtraction, multiplication, and division	2.77	95%
b. percentages	2.45	84%
c. decimals	2.43	89%
d. weights and measures	2.34	74%
5. Computer literacy	2.23	68%

Student Competency Checklist
Customer Service Representative
Business and Personal Services Marketing

Student _____

Areas of Responsibility and Tasks with Degree of Mastery Indicated
(M—Mastery, M w/ S—Mastery with Supervision, N M—Nonmastery)

A. UNDERSTAND THE CHARACTERISTICS OF SERVICES.

___1. Recognize that services are intangible.
___2. Recognize that services themselves are inseparable from the service provider.
___3. Recognize that services are perishable.
___4. Recognize that standardization of services is difficult.
___5. Recognize that customers are often involved in decisions made in providing service.
___6. Identify target markets.

B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.

___1. Keep customer service/sales area clean and well organized.
___2. Establish and maintain familiarity with merchandise and its location, if applicable.
___3. Establish and maintain familiarity with services available for purchase by customer.
___4. Maintain records used in the business.
___5. Be helpful, friendly, courteous, and professional.

C. DEVELOP AND MAINTAIN A CUSTOMER-SERVICE ATTITUDE.

___1. Greet every customer with a smile.
___2. Identify the needs of customers.
___3. Be attentive to customers' verbal and nonverbal signals.
___4. Explain/demonstrate the products and/or services which best meet the needs of customers.
___5. Complete the customer's order as pleasantly, accurately, and effectively as possible.
___6. Provide service at a level that helps ensure repeat customers.

D. PROCESS SALES TRANSACTIONS.

___1. Know all necessary product, department, and service codes.
___2. Scan, key-enter items into cash register or write sales order.
___3. Correct mistakes when made.
___4. Redeem promotional coupons, if applicable.
___5. Follow company procedures for returns, voids, and charges.
___6. Give customers receipt.
___7. Thank customers for business.

E. MAINTAIN SAFE AND SECURE ENVIRONMENT.

___1. Use proper techniques for lifting, reaching.
___2. Use tools and equipment properly and safely.
___3. Know and follow company's safety policies and emergency procedures.
___4. Stay alert to and report suspicious activities.
___5. Follow proper procedures to protect against shoplifting, quick-change artists, and fraudulent use of checks.

F. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.

___1. Know and follow company policies and procedures.
___2. Meet or exceed company standards of personal hygiene.
___3. Communicate positive body language to customers, other employees, and management.
___4. Establish and maintain positive working relationships.
___5. Assist in other business duties as needed.
___6. Develop and improve good oral and written communication skills.

G. OTHER SKILLS AND KNOWLEDGE

___1. Reading
2. Communication:
___ a. written
___ b. oral
___ c. listening
___3. Handwriting
4. Mathematics:
___ a. addition, subtraction, multiplication, and division
___ b. percentages
___ c. decimals
___ d. weights and measures
___5. Computer literacy

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Tools and Equipment for Customer Service Representatives in Business and Personal Services Marketing

Introduction

The tools and equipment used by customer service representatives in business and personal services marketing vary according to the occupational category of the employee, the size of the store, and the company's operating policies and procedures. Perhaps more than other categories, business and personal services marketing has extreme diversity, with companies ranging from tanning salons to video rental stores to dry cleaners included in this category. However, a number of tools and equipment were consistent among the respondents and have been listed below.

Accounting/Office Forms
Bags—Paper, Plastic
Box/Case Cutter
Broom/Dust Mop/Vacuum Cleaner
Calculator
Calendar
Cash Register/Terminal
Cleaning Supplies
Computer
Credit Card Machine
Display Equipment and Supplies
Dolly
Fire Extinguisher
First-Aid Kit
Hand Tools
Inventory Forms
Ladder
Optical Scanner
Price Label Gun
Price Lists
Promotional Coupons
Receipt Tape
Sales Tickets/Order Forms
Telephone
Time Clock

Academic Skills for Employees in Business and Personal Services Marketing

Introduction

The academic skills used by employees in business and personal services marketing vary according to the occupational category of the employee, the size of the business, and the company's operating policies and procedures. Perhaps more than other categories, business and personal services marketing has extreme diversity, with companies ranging from tanning salons to video rental stores to dry cleaners included in this category. However, a number of academic skills were consistent among the respondents and have been listed below.

READING

Abbreviations and symbols
Advertisements and promotional coupons
Calendars
Charts
Computer menu
Employee benefits information
Employment forms
Job application forms
Labels
Memorandums and messages
Paychecks
Policies and procedures
Pricing information
Product information
Promotional materials
Reports—inventory, sales, etc.
Sales checks
Telephone books
Time cards
Trade publications
Work schedules

WRITING

Employment forms
Inventory forms
Job application forms
Messages
Promotional signs/tags
Records and other forms
Sales checks

MATHEMATICS

Calculator use
Change making
Charts and graphs
Inventory
Merchandise/service pricing
Paycheck verification
Receiving and checking merchandise
Records and forms
Time cards

Appendix A

Request for Validators

WE NEED VALIDATION VOLUNTEERS CURRENTLY EMPLOYED IN FOOD SERVICE AND GENERAL MERCHANDISE OPERATIONS

As you know, EIMC/Educational Resources will be conducting a study to identify the most important tasks that workers in **food service management** and **general merchandise retailing** training positions perform. A separate validator request will follow for business and personal services marketing.

At this time, we need approximately 150 workers and supervisors with **current** occupational expertise to validate the tasks which will be identified. We could use your help in locating volunteer validators, so please return this sheet to your District Curriculum Chair or call Suzanne Faught at UT (1-800-252-3461). The sooner we get the names, the better but **please** no later than November 15.

Thank you for providing the following information for business people you would recommend for the validation process:

TEACHER/HIGH SCHOOL/CITY:_____

1. NAME OF BUSINESS:_____
   ADDRESS:_____
   _____
   TELEPHONE NUMBER:_____
   NAME OF VALIDATOR:_____
   CHECK CATEGORY TO VALIDATE: _____ Food Service Management
   _____ GM Cashier _____ GM Stocker _____ GM Salesperson

2. NAME OF BUSINESS:_____
   ADDRESS:_____
   _____
   TELEPHONE NUMBER:_____
   NAME OF VALIDATOR:_____
   CHECK CATEGORY TO VALIDATE: _____ Food Service Management
   _____ GM Cashier _____ GM Stocker _____ GM Salesperson

Appendix B

General Merchandise Retailing Surveys

CASHIER IN GENERAL MERCHANDISE RETAILING

PURPOSE: The purpose of this survey is to identify the most important tasks that cashiers in general merchandise retailing perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have had _____ years' experience as a cashier, including _____ years in general merchandise retailing.
4. I have had _____ years' experience in supervising cashiers, including _____ years in general merchandise retailing.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into six major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How <u>important</u> is the task in the role of a cashier in general merchandise retailing?
2. Is the task expected of a <u>beginning</u> (entry-level) cashier in general merchandise retailing?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.					
1. Keep checkstand area clean and well organized.	3	2	1	2	1
2. Keep checkstand merchandise stocked and well organized.	3	2	1	2	1
3. Replace receipt tape quickly and effectively.	3	2	1	2	1
4. Establish and maintain familiarity with merchandise and its location.	3	2	1	2	1
5. Be helpful, friendly, courteous, and professional.	3	2	1	2	1
6. Establish and maintain good customer relations.	3	2	1	2	1
7. Be sensitive to needs of customer's companions.	3	2	1	2	1
8.					
B. PROCESS SALES TRANSACTIONS.					
1. Know all necessary product codes and department codes.	3	2	1	2	1
2. Scan/key-enter items.	3	2	1	2	1
3. Correct mistakes when made.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
4. Redeem promotional coupons.	3	2	1	2	1
5. Follow company procedures for returns, voids, and charges.	3	2	1	2	1
6. Collect payment from customers and make change as required.	3	2	1	2	1
7. Package merchandise for customers.	3	2	1	2	1
8. Give customers receipts and merchandise.	3	2	1	2	1
9. Thank customers for business.	3	2	1	2	1
10.					
C. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Use proper techniques for lifting, reaching, etc.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow employer's safety policies.	3	2	1	2	1
4. Know and follow proper emergency procedures.	3	2	1	2	1
5. Stay alert to and report suspicious activities.	3	2	1	2	1
6. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.	3	2	1	2	1
7. Follow proper procedures when selling regulated merchandise (spray paint, glue, tobacco products, etc.)	3	2	1	2	1
8.					
D. DEVELOP AND MAINTAIN A CUSTOMER SERVICE ATTITUDE.					
1. Greet every customer with a smile.	3	2	1	2	1
2. Check the customer's order as pleasantly, accurately, and effectively as possible.	3	2	1	2	1
3. Help customers locate items.	3	2	1	2	1
4. Thank every customer when he/she leaves.	3	2	1	2	1
5. Help other cashiers to provide quicker customer service.	3	2	1	2	1
6.					
E. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.					
1. Know and follow company's policies and procedures.	3	2	1	2	1
2. Participate in meetings, training sessions, and other continuing education activities.	3	2	1	2	1
3. Establish and maintain positive working relationships.	3	2	1	2	1
4. Assist in other areas of the store as needed (receiving, display, stocking, inventory)	3	2	1	2	1
5. Develop and maintain good oral and written communication skills.	3	2	1	2	1
6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	3	2	1	2	1
7.					

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
F. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
PLEASE RETURN IT IN THE ENCLOSED POSTAGE-PAID ENVELOPE
BY DECEMBER 1, 1993.

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STOCKER IN GENERAL MERCHANDISE RETAILING

PURPOSE: The purpose of this survey is to identify the most important tasks that stockers in general merchandise retailing perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have had _____ years' experience in stocking, including _____ years in general merchandise retailing.
4. I have had _____years' experience in supervising stockers, including _____ years in general merchandise retailing.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into ten major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How <u>important</u> is the task in the role of a stocker in general merchandise retailing?
2. Is the task expected of a <u>beginning</u> (entry-level) stocker in general merchandise retailing?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. RECEIVE MERCHANDISE.					
1. Unload the truck.	3	2	1	2	1
2. Check carton and goods for damage.	3	2	1	2	1
3. Move goods to appropriate area.	3	2	1	2	1
4. Cut cartons open and test-scan as required.	3	2	1	2	1
5. Check goods against packing slip/invoice.	3	2	1	2	1
6. Prepare and distribute paperwork as required.	3	2	1	2	1
7.					
B. HANDLE DISCREPANCIES WITH MERCHANDISE RECEIVED.					
1. Record problem on proper form.	3	2	1	2	1
2. Obtain decision on how to handle problem.	3	2	1	2	1
3 Carry out decision.	3	2	1	2	1
4. Prepare/distribute appropriate paperwork as required.	3	2	1	2	1
5.					

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
C. PREPARE SALES AREA.					
1. Clean sales floor.	3	2	1	2	1
2. Do minor maintenance and repair.	3	2	1	2	1
3. Remove any out-of-place items.	3	2	1	2	1
4. Perform visual check of shelves to identify items to replenish.	3	2	1	2	1
5.					
D. STOCK SALES AREA					
1. After rotating existing items, stock shelves with new, transferred, or back-stock merchandise.	3	2	1	2	1
2. Hang advertising signs and shelf tags.	3	2	1	2	1
3. Reallocate shelf space.	3	2	1	2	1
4. Create displays as appropriate.	3	2	1	2	1
5.					
E. MAINTAIN STOCKROOM.					
1. Keep area and merchandise clean and organized.	3	2	1	2	1
2. Place new stock in appropriate location.	3	2	1	2	1
3. Rotate merchandise.	3	2	1	2	1
4. Keep area and merchandise ready for inventory.	3	2	1	2	1
5.					
F. ASSIST WITH PHYSICAL INVENTORY.					
1. Ensure merchandise is located and organized properly.	3	2	1	2	1
2. Count merchandise and record findings as appropriate.	3	2	1	2	1
3. Distribute paperwork as required.	3	2	1	2	1
4.					
G. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Use proper techniques for lifting, reaching, etc.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Keep areas clean and walkways clear.	3	2	1	2	1
4. Know and follow employer's safety policies.	3	2	1	2	1
5. Know and follow proper emergency procedures.	3	2	1	2	1
6. Know and follow sanitation standards.	3	2	1	2	1
7. Stay alert to and report suspicious activities.	3	2	1	2	1
8.					
H. DEVELOP AND MAINTAIN A CUSTOMER SERVICE ATTITUDE.					
1. Help customers locate items.	3	2	1	2	1
2. Answer customer questions about products.	3	2	1	2	1
3. Respond to customer requests or refer them to the appropriate person.	3	2	1	2	1
4.					

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
I. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.					
1. Know and follow company policies and procedures.	3	2	1	2	1
2. Participate in meetings, training sessions, and other continuing education activities.	3	2	1	2	1
3. Establish and maintain positive working relationships.	3	2	1	2	1
4. Develop and maintain good oral and written communication skills.	3	2	1	2	1
5. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	3	2	1	2	1
6.					
J. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy					
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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BY DECEMBER 1, 1993.

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SALESPERSON IN GENERAL MERCHANDISE RETAILING

PURPOSE: The purpose of this survey is to identify the most important tasks that salespeople in general merchandise retailing perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience in sales, including _____ years in general merchandise retailing.
4. I have _____ years' experience in supervising salespeople, including _____ years in general merchandise retailing.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into eight major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How important is the task in the role of a salesperson in general merchandise retailing?
2. Is the task expected of a beginning (entry-level) salesperson in general merchandise retailing?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. MAINTAIN INVENTORY/STOCK.					
1. Monitor stock for worn and damaged items.	3	2	1	2	1
2. Price and reprice merchandise.	3	2	1	2	1
3. Prepare stock for the sales floor.	3	2	1	2	1
4. Monitor and suggest inventory needs.	3	2	1	2	1
5. Assist in physical inventory.	3	2	1	2	1
6.					
B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.					
1. Keep sales floor, merchandise, and stockroom neat, clean, well stocked, and well organized.	3	2	1	2	1
2. Ensure that merchandise is properly displayed and tagged.	3	2	1	2	1
3. Establish and maintain familiarity with merchandise and its location.	3	2	1	2	1
4.					

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
C. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Use proper techniques for lifting, reaching, etc.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow employer's safety policies/emergency procedures.	3	2	1	2	1
4. Follow proper procedures to protect against shoplifting, improper returns, quick-change artists, and fraudulent use of checks.	3	2	1	2	1
5.					
D. DEVELOP AND MAINTAIN A CUSTOMER SERVICE ATTITUDE.					
1. Greet every customer with a smile.	3	2	1	2	1
2. Process the customer's transaction as pleasantly, accurately, and effectively as possible.	3	2	1	2	1
3. Help customers locate items.	3	2	1	2	1
4. Thank every customer when he/she leaves.	3	2	1	2	1
5. Help other salespeople to provide quicker customer service.	3	2	1	2	1
6.					
E. SELL MERCHANDISE AND RELATED SERVICES.					
1. Monitor and respond promptly to customer traffic.	3	2	1	2	1
2. Listen to customers to determine their wants and needs.	3	2	1	2	1
3. Create customer desire.	3	2	1	2	1
4. Inform customers about available merchandise and its location.	3	2	1	2	1
5. Translate product features into customer benefits.	3	2	1	2	1
6. Close the sale.	3	2	1	2	1
7. Suggest related services, e.g., opening credit accounts, layaways, gift wrap, delivery.	3	2	1	2	1
8.					
F. PROCESS SALES TRANSACTION.					
1. Determine method of payment.	3	2	1	2	1
2. Prepare sales and charge slips.	3	2	1	2	1
3. Prepare paperwork for related services, if applicable.	3	2	1	2	1
4. Scan/key-enter sales into register.	3	2	1	2	1
5. Obtain approval for checks and credit cards.	3	2	1	2	1
6. Make change as required.	3	2	1	2	1
7. Package merchandise for customers.	3	2	1	2	1
8. Give customers receipts and merchandise.	3	2	1	2	1
9. Offer customer reassurance about purchase.	3	2	1	2	1
10. Thank customers for business.	3	2	1	2	1
11.					

TASK	IMPORTANCE OF TASK Essential 3	Important 2	Not Impt. 1	ENTRY LEVEL Yes 2	No 1
G. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.					
1. Know and follow company's policies and procedures.	3	2	1	2	1
2. Participate in meetings, training sessions, and other continuing education activities.	3	2	1	2	1
3. Establish and maintain positive working relationships.	3	2	1	2	1
4. Assist in other areas of the store as needed (receiving, display, stocking, inventory).	3	2	1	2	1
5. Develop and maintain good oral and written communication skills.	3	2	1	2	1
6. Develop and maintain personal characteristics and attitudes that enhance value as an employee.	3	2	1	2	1
7.					
H. OTHER SKILLS AND KNOWLEDGE.					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

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DEPARTMENT MANAGER/SUPERVISOR IN GENERAL MERCHANDISE RETAILING

PURPOSE: The purpose of this survey is to identify the most important tasks that department manager/supervisors in general merchandise retailing perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience as a department manager/supervisor, including _____ years in general merchandise retailing.
4. I have _____ years' experience in supervising department managers/supervisors, including ___ years in general merchandise retailing.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into nine major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How <u>important</u> is the task in the role of a department manager/supervisor in general merchandise retailing?
2. Is the task expected of a <u>beginning</u> department manager/supervisor in general merchandise retailing?

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. PLAN DAILY OPERATIONS FOR THE DEPARTMENT.					
1. Prepare department work schedule.	3	2	1	2	1
2. Adjust work schedule when required.	3	2	1	2	1
3. Assign duties to workers.	3	2	1	2	1
4. Expedite work flow.	3	2	1	2	1
5. Assist employees when required.	3	2	1	2	1
6.					
B. MONITOR STOCK CONDITIONS IN BACKROOM AREA.					
1. Order merchandise and supplies.	3	2	1	2	1
2. Receive merchandise.	3	2	1	2	1
3. Unload trucks when required.	3	2	1	2	1
4. Ensure that merchandise is properly stored.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
5. Maintain most economic quantity of on-hand inventory.	3	2	1	2	1
6. Ensure that backroom area is neat and clean.	3	2	1	2	1
7.					
C. MONITOR STOCK CONDITIONS ON SALES FLOOR.					
1. Ensure that items in need of replenishment are identified.	3	2	1	2	1
2. Ensure that older merchandise is rotated to front of shelves.	3	2	1	2	1
3. Plan and create displays as required.	3	2	1	2	1
4. Ensure that special price signs are made and hung.	3	2	1	2	1
5. Ensure that all merchandise is correctly priced and displayed.	3	2	1	2	1
6.					
D. TRAIN NEW EMPLOYEES.					
1. Provide instruction in store policies.	3	2	1	2	1
2. Provide instruction in security, sales, and record-keeping procedures.	3	2	1	2	1
3. Perform on-the-job training in specific job duties.	3	2	1	2	1
4. Provide ongoing evaluation of employees.	3	2	1	2	1
5.					
E. MAINTAIN AND IMPROVE CUSTOMER SERVICE ATTITUDE.					
1. Respond promptly to customer needs.	3	2	1	2	1
2. Resolve customer problems or refer to store manager.	3	2	1	2	1
3. Promote good public relations.	3	2	1	2	1
4.					
F. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Ensure that pallets are emptied, floors are mopped, and empty boxes are crushed as required.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow safety policies.	3	2	1	2	1
4. Know and follow emergency procedures.	3	2	1	2	1
5. Report shoplifting and employee thefts.	3	2	1	2	1
6.					
G. PERFORM ADDITIONAL MANAGEMENT DUTIES.					
1. Perform department opening/closing procedures.	3	2	1	2	1
2. Use computer system as required.	3	2	1	2	1
3. Prepare sales and inventory reports.	3	2	1	2	1
4. Monitor labor expenses and productivity levels.	3	2	1	2	1
5.					
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.					
1. Establish and maintain positive working relationships.	3	2	1	2	1
2. Demonstrate pride in self, job, and employer.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
3. Stay abreast of company and industry trends.	3	2	1	2	1
4. Participate in professional and personal development activities.	3	2	1	2	1
5.					
I. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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BY DECEMBER 1, 1993.

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Appendix C

Food Service Management Surveys

RESTAURANT WAITPERSON

PURPOSE: The purpose of this survey is to identify the most important tasks that restaurant waitpersons perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience as a waitperson.
4. I have _____ years' experience in supervising waitpersons.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into eight major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How important is the task in the role of a restaurant waitperson?
2. Is the task expected of an entry-level restaurant waitperson?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
A. PERFORM CLEANING AND SANITIZING FUNCTIONS.					
1. Clean and sanitize equipment, utensils, and tableware.	3	2	1	2	1
2. Clean and sanitize work and storage areas.	3	2	1	2	1
3. Know and follow pest control procedures.	3	2	1	2	1
4.					
B. PERFORM SETUP, SERVICE, AND CLEANUP FUNCTIONS.					
1. Set up room for table service or buffet dining.	3	2	1	2	1
2. Set tables and serving lines for selected styles of service.	3	2	1	2	1
3. Replenish food, beverages, condiments, and table linens.	3	2	1	2	1
4. Clean up after serving a meal.	3	2	1	2	1
5. Store leftover food properly.	3	2	1	2	1
6.					

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
C. PREPARE AND SERVE BEVERAGES.					
1. Brew and/or serve coffee, tea, and soft drinks.	3	2	1	2	1
2. Prepare and serve milk or milk product beverages, if offered.	3	2	1	2	1
3. Prepare and serve fruit juices and/or beverages, if offered.	3	2	1	2	1
4. Prepare and serve alcoholic beverages, if offered.	3	2	1	2	1
5.					
D. PREPARE COLD FOODS.					
1. Prepare salads and salad dressings.	3	2	1	2	1
2. Prepare garnishes.	3	2	1	2	1
3. Prepare food trays, appetizers, and seafood cocktails, if offered.	3	2	1	2	1
4. Prepare cold sandwiches.	3	2	1	2	1
5.					
E. DEVELOP AND IMPROVE CUSTOMER RELATIONS.					
1. Receive reservations for dining.	3	2	1	2	1
2. Receive phone orders.	3	2	1	2	1
3. Greet and seat guests, giving each guest a menu.	3	2	1	2	1
4. Provide water, according to company policy.	3	2	1	2	1
5. Interpret menu and take food orders.	3	2	1	2	1
6. Bring the order to the kitchen.	3	2	1	2	1
7. Serve each order.	3	2	1	2	1
8. Continue to monitor each customer throughout the meal.	3	2	1	2	1
9. Refill/replace beverages and suggest additional items.	3	2	1	2	1
10. Present check to customer.	3	2	1	2	1
11. Operate cash register/credit card machine, if necessary.	3	2	1	2	1
12. Remove dishes from table, if necessary.	3	2	1	2	1
13.					
F. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Know and follow company standards of personal hygiene.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow health and safety policies.	3	2	1	2	1
4. Know and follow emergency fire and first-aid procedures.	3	2	1	2	1
5. Report accidents and employee thefts.	3	2	1	2	1
6.					
G. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.					
1. Establish and maintain positive working relationships.	3	2	1	2	1
2. Demonstrate pride in self, job, and employer.	3	2	1	2	1
3. Stay abreast of company and industry trends.	3	2	1	2	1
4. Participate in professional and personal development activities.	3	2	1	2	1
5.					

TASK	IMPORTANCE OF TASK Essential 3	Important 2	Not Impt. 1	ENTRY-LEVEL Yes 2	No 1
H. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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RESTAURANT MANAGER/SUPERVISOR

PURPOSE: The purpose of this survey is to identify the most important tasks that restaurant manager/ supervisors perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience as a manager/supervisor, including _____ years in restaurants.
4. Comments (use last page of this packet and/or additional paper, if desired) (optional).

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into nine major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How <u>important</u> is the task in the role of a restaurant manager/supervisor?
2. Is the task expected of a <u>beginning</u> restaurant manager/supervisor?

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.					
1. Prepare work schedule.	3	2	1	2	1
2. Adjust work schedule when required.	3	2	1	2	1
3. Assign duties to workers.	3	2	1	2	1
4. Expedite work flow.	3	2	1	2	1
5. Assist employees when required.	3	2	1	2	1
6.					
B. MONITOR STOCK CONDITIONS IN STORAGE AREA.					
1. Take inventory of food items, supplies, and tableware.	3	2	1	2	1
2. Order food items, supplies, and tableware.	3	2	1	2	1
3. Receive items and ensure that they are properly stored.	3	2	1	2	1
4. Maintain most economic quantity of on-hand inventory.	3	2	1	2	1
5. Keep storage area neat, clean, and sanitized.	3	2	1	2	1
6.					

TASK	IMPORTANCE OF TASK Essential 3	Important 2	Not Impt. 1	BEGINNING Yes 2	No 1
C. MANAGE HUMAN RESOURCES.					
1. Interview applicants and hire personnel.	3	2	1	2	1
2. Provide instruction in company policies.	3	2	1	2	1
3. Perform on-the-job training in specific job duties.	3	2	1	2	1
4. Provide ongoing evaluation of employees.	3	2	1	2	1
5. Organize and teach workshops for employees.	3	2	1	2	1
6. Identify grounds and procedures for dismissing personnel.	3	2	1	2	1
7.					
D. MAINTAIN AND IMPROVE CUSTOMER SERVICE ATTITUDE.					
1. Greet guests, as required.	3	2	1	2	1
2. Interpret the menu and take food orders, as required.	3	2	1	2	1
3. Operate cash register/terminal, as required.	3	2	1	2	1
4. Respond promptly to customer needs.	3	2	1	2	1
5. Resolve customer problems.	3	2	1	2	1
6. Promote good public relations.	3	2	1	2	1
7.					
E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.					
1. Ensure that all employees meet standards of personal hygiene.	3	2	1	2	1
2. Ensure that work and storage areas are clean and sanitized.	3	2	1	2	1
3. Know and follow pest control procedures.	3	2	1	2	1
4. Use tools and equipment properly and safely.	3	2	1	2	1
5. Know and follow health and safety policies.	3	2	1	2	1
6. Know and follow emergency fire and first-aid procedures.	3	2	1	2	1
7. Document accidents and employee thefts.	3	2	1	2	1
8.					
F. PERFORM ADDITIONAL MANAGEMENT DUTIES.					
1. Perform opening/closing procedures.	3	2	1	2	1
2. Use computer system as required.	3	2	1	2	1
3. Prepare sales and inventory reports.	3	2	1	2	1
4. Prepare bills and payroll for payment.	3	2	1	2	1
5. Monitor labor expenses and productivity levels.	3	2	1	2	1
6. Calculate cost and selling price for menu items and services.	3	2	1	2	1
7.					
G. DEVELOP MARKETING STRATEGIES.					
1. Determine target market.	3	2	1	2	1
2. Conduct market survey.	3	2	1	2	1
3. Conduct follow-up survey to determine customer satisfaction.	3	2	1	2	1
4. Develop presentation sheets for menu items.	3	2	1	2	1
5. Design and/or employ specialists to design advertising and promotional displays.	3	2	1	2	1
6. Survey the market for new products and equipment.	3	2	1	2	1
7.					

TASK	IMPORTANCE OF TASK Essential 3	Important 2	Not Impt. 1	BEGINNING Yes 2	No 1
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.					
1. Establish and maintain positive working relationships.	3	2	1	2	1
2. Demonstrate pride in self, job, and employer.	3	2	1	2	1
3. Stay abreast of company and industry trends.	3	2	1	2	1
4. Participate in professional and personal development activities.	3	2	1	2	1
5. Develop time management skills.	3	2	1	2	1
6.					
I. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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BY DECEMBER 1, 1993.

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QUICK-SERVE RESTAURANT CREW LEADER

PURPOSE: The purpose of this survey is to identify the most important tasks that quick-serve restaurant crew leaders perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience as a quick-serve crew leader.
4. I have _____ years' experience in supervising quick-serve crew leaders.
5. Use last page of this packet and/or additional paper for comments. (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into seven major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How <u>important</u> is the task in the role of a quick-serve restaurant crew leader?
2. Is the task expected of an <u>entry-level</u> quick-serve restaurant crew leader?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
A. PERFORM CLEANING AND SANITIZING FUNCTIONS.					
1. Clean and sanitize equipment and utensils.	3	2	1	2	1
2. Clean and sanitize work and storage areas.	3	2	1	2	1
3. Know and follow pest control procedures.	3	2	1	2	1
4.					
B. PREPARE AND SERVE BEVERAGES.					
1. Brew and/or serve coffee, tea, and soft drinks.	3	2	1	2	1
2. Prepare and serve milk or milk product beverages, if offered.	3	2	1	2	1
3. Prepare and serve fruit juices and/or beverages, if offered.	3	2	1	2	1
4. Prepare and serve alcoholic beverages, if offered.	3	2	1	2	1
5.					
C. PREPARE COLD FOODS.					
1. Prepare salads and salad dressings, if offered.	3	2	1	2	1
2. Prepare cold sandwiches, if offered.	3	2	1	2	1
3.					
D. DEVELOP AND IMPROVE CUSTOMER RELATIONS.					
1. Receive phone orders.	3	2	1	2	1
2. Interpret menu and take food orders.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
3. Fill some or all of the customer's order.	3	2	1	2	1
4. Suggest additional items.	3	2	1	2	1
5. Operate cash register/credit card machine, if necessary.	3	2	1	2	1
6. Count change and issue receipt.	3	2	1	2	1
7. Perform nonselling jobs necessary for the selling effort.	3	2	1	2	1
8.					
E. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Know and follow company standards of personal hygiene.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow health and safety policies.	3	2	1	2	1
4. Know and follow emergency fire and first-aid procedures.	3	2	1	2	1
5. Report accidents and employee thefts.	3	2	1	2	1
6.					
F. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.					
1. Establish and maintain positive working relationships.	3	2	1	2	1
2. Demonstrate pride in self, job, and employer.	3	2	1	2	1
3. Stay abreast of company and industry trends.	3	2	1	2	1
4. Participate in professional and personal development activities.	3	2	1	2	1
5.					
G. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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QUICK-SERVE RESTAURANT SUPERVISOR/MANAGER-TRAINEE

PURPOSE: The purpose of this survey is to identify the most important tasks that quick-serve restaurant supervisors/manager-trainees perform. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience as a manager/supervisor, including _____ years in quick-serve restaurants.
4. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into nine major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How important is the task in the role of a quick-serve restaurant supervisor/manager-trainee?
2. Is the task expected of a beginning quick-serve restaurant supervisor/manager-trainee?

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. PLAN DAILY OPERATIONS FOR THE RESTAURANT.					
1. Prepare work schedule.	3	2	1	2	1
2. Adjust work schedule when required.	3	2	1	2	1
3. Assign duties to workers.	3	2	1	2	1
4. Expedite work flow.	3	2	1	2	1
5. Assist employees when required.	3	2	1	2	1
6.					
B. MONITOR STOCK CONDITIONS IN STORAGE AREA.					
1. Take inventory of food items and supplies.	3	2	1	2	1
2. Order food items and supplies.	3	2	1	2	1
3. Receive items and ensure that they are properly stored.	3	2	1	2	1
4. Maintain most economic quantity of on-hand inventory.	3	2	1	2	1
5. Keep storage area neat, clean, and sanitized.	3	2	1	2	1
6.					

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential 3	Important 2	Not Impt. 1	Yes 2	No 1
C. MANAGE HUMAN RESOURCES.					
1. Interview applicants and hire personnel.	3	2	1	2	1
2. Provide instruction in company policies.	3	2	1	2	1
3. Perform on-the-job training in specific job duties.	3	2	1	2	1
4. Provide ongoing evaluation of employees.	3	2	1	2	1
5. Organize and teach workshops for employees.	3	2	1	2	1
6. Identify grounds and procedures for dismissing personnel.	3	2	1	2	1
7.					
D. MAINTAIN AND IMPROVE CUSTOMER SERVICE ATTITUDE.					
1. Greet guests, as required.	3	2	1	2	1
2. Interpret the menu and take food orders, as required.	3	2	1	2	1
3. Operate cash register/terminal as required.	3	2	1	2	1
4. Respond promptly to customer needs.	3	2	1	2	1
5. Resolve customer problems.	3	2	1	2	1
6. Promote good public relations.	3	2	1	2	1
7.					
E. MAINTAIN CLEAN, HEALTHY, SAFE, AND SECURE ENVIRONMENT.					
1. Ensure that all employees meet company standards of personal hygiene.	3	2	1	2	1
2. Ensure that work and storage areas are clean and sanitized.	3	2	1	2	1
3. Know and follow pest control procedures.	3	2	1	2	1
4. Use tools and equipment properly and safely.	3	2	1	2	1
5. Know and follow health and safety policies.	3	2	1	2	1
6. Know and follow emergency fire and first-aid procedures.	3	2	1	2	1
7. Document accidents and employee thefts.	3	2	1	2	1
8.					
F. PERFORM ADDITIONAL MANAGEMENT DUTIES.					
1. Perform opening/closing procedures.	3	2	1	2	1
2. Use computer system as required.	3	2	1	2	1
3. Prepare sales and inventory reports.	3	2	1	2	1
4. Prepare bills and payroll for payment.	3	2	1	2	1
5. Monitor labor expenses and productivity levels.	3	2	1	2	1
6.					
G. DEVELOP MARKETING STRATEGIES.					
1. Determine target market.	3	2	1	2	1
2. Conduct market survey.	3	2	1	2	1
3. Conduct follow-up survey to determine customer satisfaction.	3	2	1	2	1
4. Survey the market for new products and equipment.	3	2	1	2	1
5.					

TASK	IMPORTANCE OF TASK			BEGINNING	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
H. PROMOTE PERSONAL AND PROFESSIONAL DEVELOPMENT.					
1. Establish and maintain positive working relationships.	3	2	1	2	1
2. Demonstrate pride in self, job, and employer.	3	2	1	2	1
3. Stay abreast of company and industry trends.	3	2	1	2	1
4. Participate in professional and personal development activities.	3	2	1	2	1
5. Develop time management skills.	3	2	1	2	1
6.					
I. OTHER SKILLS AND KNOWLEDGE.					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
3. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
4. Computer literacy	3	2	1	2	1
5.					

THANK YOU FOR COMPLETING THIS SURVEY.
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Appendix D

Business and Personal Services Marketing Survey

CUSTOMER SERVICE REPRESENTATIVE IN BUSINESS AND PERSONAL SERVICES MARKETING

PURPOSE: The purpose of this survey is to identify the most important tasks that customer service representatives in business and personal services marketing perform. Businesses in this occupational category include, but are not limited to, dry cleaners, tanning salons, telemarketing companies, video rental stores, and health/exercise clubs. This information will be used to develop training plans and instructional materials to prepare high school students for successful work in this area. Your help in this project is very important. Please read the directions carefully and answer every question. Feel free to add any additional tasks or general comments you may have.

PART I—GENERAL INFORMATION

INSTRUCTIONS: Read each item carefully and write your response in the blanks provided.

1. I currently work at _____ (name of employer).
2. My job title is _____.
3. I have _____ years' experience in sales and/or customer service.
4. I have _____ years' experience in supervising salespeople/customer service representatives.
5. Comments (use last page of this packet and/or additional paper, if desired) (optional)

PART II—TASKS

INSTRUCTIONS: This questionnaire contains a list of tasks divided into seven major areas. For each task, answer the two following questions by circling one response in each column. Be sure to answer both questions for every task.

1. How important is the task in the role of a customer service representative?
2. Is the task expected of a beginning (entry-level) customer service representative?

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
A. UNDERSTAND THE CHARACTERISTICS OF SERVICES.					
1. Recognize that services are intangible.	3	2	1	2	1
2. Recognize that services themselves are inseparable from the service provider.	3	2	1	2	1
3. Recognize that services are perishable.	3	2	1	2	1
4. Recognize that standardization of services is difficult.	3	2	1	2	1
5. Recognize that customers are often involved in the decisions involved in providing the service.	3	2	1	2	1
6. Identify target markets.	3	2	1	2	1
7.					
B. MAINTAIN ENVIRONMENT CONDUCIVE TO SELLING.					
1. Keep customer service/sales area clean and well organized.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
2. Establish and maintain familiarity with merchandise and its location, if applicable.	3	2	1	2	1
3. Establish and maintain familiarity with services available for purchase by the customer.	3	2	1	2	1
4. Maintain records used in the business.	3	2	1	2	1
5. Be helpful, friendly, courteous, and professional.	3	2	1	2	1
6.					
C. DEVELOP AND MAINTAIN A CUSTOMER SERVICE ATTITUDE.					
1. Greet every customer with a smile.	3	2	1	2	1
2. Identify the needs of customers.	3	2	1	2	1
3. Be attentive to customers' verbal and nonverbal signals.	3	2	1	2	1
4. Explain/demonstrate the products and/or services which best meet the needs of customers.	3	2	1	2	1
5. Complete the customer's order as pleasantly, accurately, and effectively as possible.	3	2	1	2	1
6. Provide service at a level that helps ensure repeat customers.	3	2	1	2	1
7.					
D. PROCESS SALES TRANSACTIONS.					
1. Know all necessary product, department, and service codes.	3	2	1	2	1
2. Scan, key-enter items into cash register or write sales order.	3	2	1	2	1
3. Correct mistakes when made.	3	2	1	2	1
4. Redeem promotional coupons, if applicable.	3	2	1	2	1
5. Follow company procedures for returns, voids, and charges.	3	2	1	2	1
6. Give customers receipt.	3	2	1	2	1
7. Thank customers for business.	3	2	1	2	1
8.					
E. MAINTAIN SAFE AND SECURE ENVIRONMENT.					
1. Use proper techniques for lifting, reaching, etc.	3	2	1	2	1
2. Use tools and equipment properly and safely.	3	2	1	2	1
3. Know and follow company safety policies.	3	2	1	2	1
4. Know and follow proper emergency procedures.	3	2	1	2	1
5. Stay alert to and report suspicious activities.	3	2	1	2	1
6. Follow proper procedures to protect against shoplifting, quick-change artists, and fraudulent use of checks.	3	2	1	2	1
7.					
F. DEVELOP AND MAINTAIN PROFESSIONAL BEHAVIORS AND ATTITUDES.					
1. Know and follow company policies and procedures.	3	2	1	2	1
2. Meet or exceed the company standards of personal hygiene.	3	2	1	2	1
3. Communicate positive body language to customers, other employees, and management.	3	2	1	2	1
4. Establish and maintain positive working relationships.	3	2	1	2	1
5. Assist in other duties within the business as needed.	3	2	1	2	1

TASK	IMPORTANCE OF TASK			ENTRY LEVEL	
	Essential	Important	Not Impt.	Yes	No
	3	2	1	2	1
6. Develop and improve good oral and written communication skills.	3	2	1	2	1
7.					
G. OTHER SKILLS AND KNOWLEDGE					
1. Reading	3	2	1	2	1
2. Communication:					
a. written	3	2	1	2	1
b. oral	3	2	1	2	1
c. listening	3	2	1	2	1
3. Handwriting	3	2	1	2	1
4. Mathematics:					
a. addition, subtraction, multiplication, and division	3	2	1	2	1
b. percentages	3	2	1	2	1
c. decimals	3	2	1	2	1
d. weights and measures	3	2	1	2	1
5. Computer literacy	3	2	1	2	1
6.					

THANK YOU FOR COMPLETING THIS SURVEY.
PLEASE RETURN IT IN THE ENCLOSED POSTAGE-PAID ENVELOPE
BY DECEMBER 1, 1993.

SUZANNE FAUGHT, MARKETING EDUCATION
THE UNIVERSITY OF TEXAS AT AUSTIN
EIMC/EDUCATIONAL RESOURCES
P.O. BOX 7218
AUSTIN, TX 78713-7218
(512) 471-7716

Appendix E

Letters and Forms That Accompanied Survey(s)

November 10, 1993

«name»
Marketing Education Teacher
«school»
«address»
«city», TX «zip»

Dear «first name»:

As part of the 1993-94 curriculum contract for marketing education, we are to conduct task validations for general merchandise retailing, food service management, and business and personal services marketing. Emmett Eary and I decided that we would focus on training positions in which marketing education students enter and can advance.

The survey instruments I have developed will be sent to two groups for validation—approximately 200 employees with current expertise in the respective business area and approximately forty marketing educators (classroom teachers, teacher-educators, etc.). The information will be used to ensure that specialized instructional materials are up-to-date and to develop industry specific teaching aids, such as competency profiles and the training plan software scheduled for distribution to ME teachers at the August conference in Galveston.

I know that this time of year is very busy, but please take just a few minutes to complete the enclosed forms and return them to me in the enclosed postage-paid envelope. There are three sets of survey forms...one for you and two (with cover letter and results request form) for distribution to businesspeople in your community. If you do not have experience in the survey field, please contact an additional businessperson. Should you have any questions or concerns, you can call our toll-free number (1-800-252-3461) and ask for me.

Your interest and cooperation with this project will help us provide improved student instructional materials and classroom aids to benefit students training in the fast-paced and competitively challenging fields of general merchandise retailing, food service management, and business and personal services marketing.

Sincerely,

Suzanne Faught, Marketing Education
EIMC/Educational Resources

Enclosures

November 10, 1993

Dear Store Employee or Manager,

The University of Texas at Austin and the Texas Education Agency are conducting a series of surveys to identify the most important tasks that entry-level and mid-management-level employees perform, so that effective and appropriate training plans and instructional materials can be developed to prepare high school students for successful training in these areas. Your valuable assistance will help ensure that the results of the study are of the highest quality.

A number of competency task lists have been developed, one for each training position. As one of approximately 200 businesspeople in Texas chosen to verify these lists, your response to the attached survey(s) will contribute significantly to our research effort and, more importantly, will help improve the quality of workers.

Please take the time now to complete the survey(s) and return them to me in the attached business reply envelope by December 1, 1993. All responses will be kept confidential and only group responses will be reported. If you wish to receive a copy of the final competency task lists, return the attached request form along with the completed survey(s).

Thank you for your valuable assistance in this important endeavor.

Sincerely,

Suzanne Faught
Curriculum Specialist for Marketing Education
EIMC/Educational Resources

enclosures

REQUEST FORM

Competency Task Lists for General Merchandise Retailing

Attached is the following completed survey(s). Please send to me a copy of the final competency task list(s) that I have checked (√), when available (anticipated date is March 1, 1994).

_____ Competency Task List for Cashiers in General Merchandise Retailing
_____ Competency Task List for Salespersons in General Merchandise Retailing
_____ Competency Task List for Stockers in General Merchandise Retailing
_____ Competency Task List for Department Managers/Supervisors in General Merchandise Retailing

Name_____

Title_____

Company_____

Address_____

City_____ State_____ ZIP_____

Return the survey(s) and this form in the enclosed business-reply envelope to

Suzanne Faught
EIMC/Educational Resources
The University of Texas at Austin
P.O. Box 7218
Austin, Texas 78713-7218

RETURN BY DECEMBER 1, 1993

REQUEST FORM

Competency Task Lists
for Food Service Management

Attached is the following completed survey(s). Please send to me a copy of the final competency task list(s) that I have checked (√), when available (anticipated date is March 1, 1994).

_____ Competency Task List for Restaurant Waitperson
_____ Competency Task List for Restaurant Manager/Supervisor
_____ Competency Task List for Quick-Serve Restaurant Crew Leader
_____ Competency Task List for Quick-Serve Restaurant Supervisor/Manager-Trainee

Name_____

Title_____

Company_____

Address_____

City_____ State_____ ZIP_____

Return the survey(s) and this form in the enclosed business-reply envelope to

Suzanne Faught
EIMC/Educational Resources
The University of Texas at Austin
P.O. Box 7218
Austin, Texas 78713-7218

RETURN BY DECEMBER 1, 1993

REQUEST FORM

Competency Task List
for Customer Service Representative
in Business and Personal Services Marketing

Attached is the following completed survey. Please send to me a copy of the final competency task list, when available (anticipated date is March 1, 1994).

Name_____

Title_____

Company_____

Address_____

City_____ State_____ ZIP_____

Return the survey and this form in the enclosed business-reply envelope to

Suzanne Faught
EIMC/Educational Resources
The University of Texas at Austin
P.O. Box 7218
Austin, Texas 78713-7218

RETURN BY DECEMBER 1, 1993

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

(1) acceptance policies on student transfers from other school districts;

(2) operation of school bus routes or runs on a non-segregated basis;

(3) nondiscrimination in extracurricular activities and the use of school facilities;

(4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;

(5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;

(6) nondiscriminatory practices relating to the use of a student's first language; and

(7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964: EXECUTIVE ORDERS 11246 and 11375; TITLE IX 1973 EDUCATION AMENDMENTS: REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulation by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs of activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.